Contact Center Anywhere Administration Manager Guide

Version 8.1.1

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1 What's New in This Release

What's New in Contact Center Anywhere Administration Manager Guide, Version 8.1.1.

Table 1 lists changes described in this version of the documentation to support release 8.1.1 of the software.

Table 1. New Product Features in Contact Center Anywhere Administration Manager Guide, Version 8.1.1

Topic	Description
Chapter 5, "Adding and Editing a Company."	The Company Configuration Tool was replaced by an enhanced Company Creation Package and Company Creation Wizard, which automatically activates and deploys feature sets for a new tenant customer. In most cases, you can still manually change features.
"Maximum Number of Logged In Supervisors" on page 61.	You can limit supervisor logins by identifying the maximum number of logged in supervisors.
"Integrating CRM With the Internet or a Win32 Application" on page 68.	You can elect to provide simple CRM in a company definition. Simple CRM removes the Contacts tab in the agent's Interaction Manager interface.
"To add predictive calling to a project" on page 301.	You cannot enable Predictive or Preview interactions from individual Administration Manager (AM) screens. You must create a package to include these options, and then apply the package to the company.
Auditable administrative changes	All administrative changes are fully auditable. Auditing information includes date, time, user ID, service affected, and action taken.
"Enabling SIP Billing" on page 67.	You can enter a specific Automatic Number Identification (ANI) to exclude the cost of OnNet DNIS calls from the company.
"Enable automatic recording of Agent" on page 187.	You can specify that the system automatically records 33% of all calls. When you select this option in the company definition, users no longer have the choice of manually selecting a recording and percentage.
"Deactivate user account if inactive for [] Days" on page 78.	The system automatically deactivates a user account that has been inactive for a specified time that has been configured.
"Deleting an Agent Account" on page 198.	You can track information about when and why an agent left the company, using a the Departure Reason tab from the Options and then Agents selections.
"Creating a Parameter Extensions Library" on page 135.	Create a Parameter Extensions Library to integrate each third-party application your system uses to manage other media types, such as chat interactions.

Table 1. New Product Features in Contact Center Anywhere Administration Manager Guide, Version 8.1.1

Topic	Description
“Process of Adding Chat Interactions to a Project” on page 322.	To enable the third-party application parameters, you must first create a project.
See *Contact Center Anywhere Supervision Manager Guide*.	New Supervisor graphics for Predictive Interactions.

2 Overview of Administration Manager

This chapter describes Oracle's Administration Manager (AM), its features, and its interface with the Contact Center Anywhere (CCA) application and the call flow in a typical contact center. This chapter includes the following topics:

- Overview
- Product Features
- About the Administration Manager Interface
- CCA Reports
- Call Flow Overview

Overview

Administration Manager (AM) is a browser-based software program allowing users to set up, configure, and maintain a CCA™ (CCA) contact center. No programming experience is required to administer a CCA Contact Center. However, some planning and information gathering are necessary so that the contact center is up and running quickly and smoothly. This manual guides users through the contact center planning process, and describes how to use AM to implement the contact center.

NOTE: You need Internet Explorer, version 6.0 or later to launch AM the first time, to access the application's online help, and to display pages.

Product Features

Using AM, you can perform all contact center administration and configuration tasks from any computer with a browser and an Internet connection. The common tasks include:

- Creating agent and supervisor accounts
- Configuring agent extensions
- Defining and assigning agent skills for intelligent call routing
- Creating workgroups for handling various customer-types
- Assigning weights to agent skills within agent workgroups
- Creating routing strategies for incoming interactions of various media
- Creating Interactive Voice Response (IVR) menus
- Building content libraries for your agents to use when handling interactions
- Recording and storing prompts for greeting and handling telephone customers
- Assigning priorities to customers

- Customizing, generating, and printing contact center reports
- Troubleshooting the contact center's email system
- Preventing agents and the CCA automated callback features from calling specific phone numbers
- Segmenting the configurations for customers within a single company on the system (optional)

About the Administration Manager Interface

AM’s browser-hosted interface provides logically grouped controls for quickly navigating to all AM screens. The AM interface is divided into two sections that you can resize and an optional third section:

- **Navigation pane.** Contains five groups of links to various AM screens. As you click links in the Navigation Pane, AM displays a sortable, tabular list of member objects in the Results Pane
- **Results pane.** Is a dynamically updated area containing the members of the link you select in the Navigation pane. After selecting an object, the Results Pane also contains the editing screens for adding and modifying the properties of these objects.
- **Change partition list.** (Optional) Contains the company’s partitions. Users select a specific partition to open when logging in to AM.

NOTE: When you segment a company configuration, a Change Partition drop-down list appears in the top-right of the screen.

The Results Pane, in Figure 1, contains a list of agent accounts defined for a company. Each row represents an editable agent account.

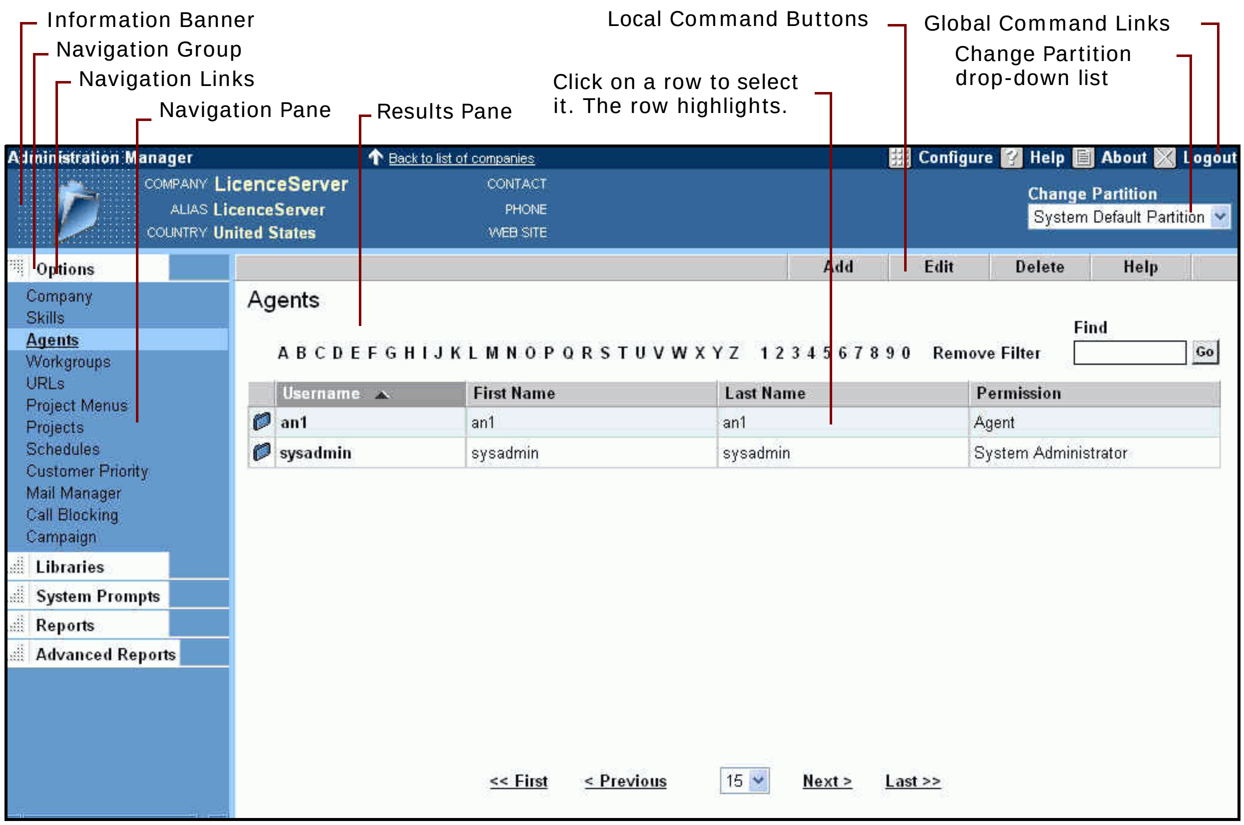

Figure 1. Example AM Screen: List of Editable Agent Accounts

Clicking anywhere on a Results Pane row selects that object for editing (or deleting). Edit by clicking a Local Command button or by right-clicking, and then selecting a command from the menu.

NOTE: The AM Options, Library, Reports, and Advanced Reports links contain no objects for editing, until you add them.

Figure 2 shows an example of the screen after selecting the Edit local command button for an account called *Jayr*.

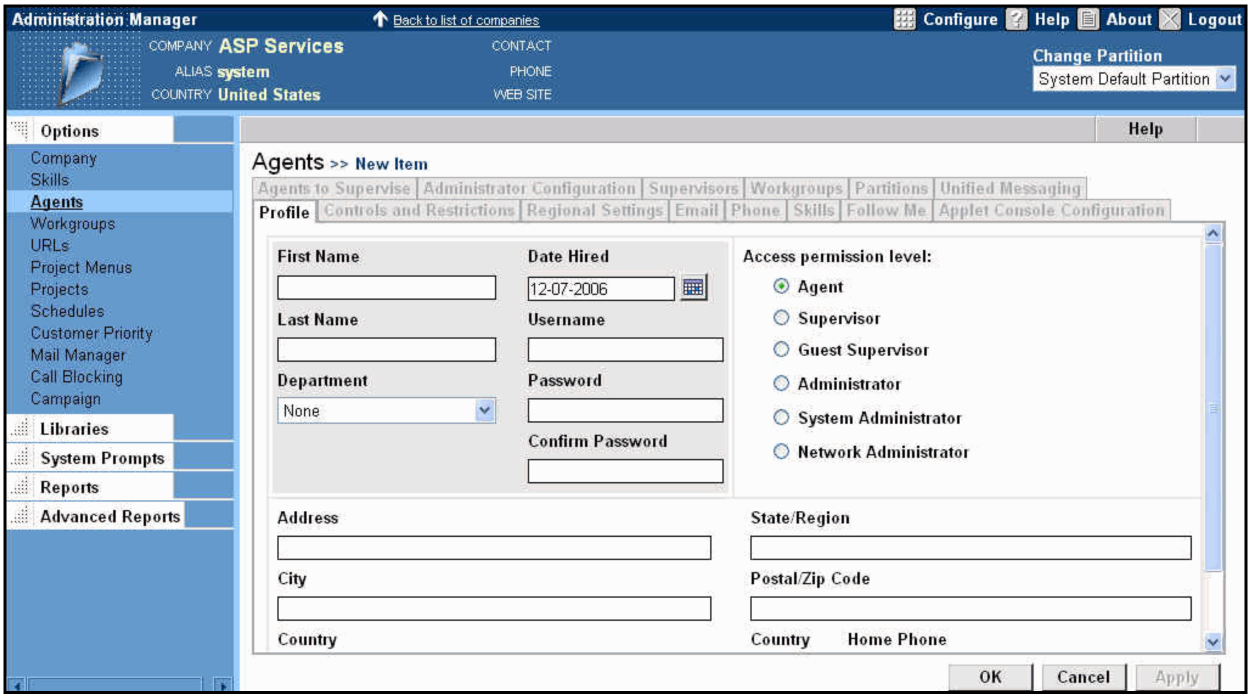

Figure 2. Editing the Selected Agent Account

Notice that this example account contains editable properties (text boxes, drop-down lists, buttons, and so on) and tabs. Click each tab to open an additional page for modifying or viewing.

CCA Reports

Use AM to define, generate, and view the full suite of CCA reports.

TIP: See *Contact Center Anywhere Reports* for a complete description of report types, how to create reports, and how to view reports.

Call Flow Overview

The following steps describe the workflow for a call:

1. A customer dials a call to the contact center.
2. CCA finds the project, using the number that the customer dialed.
3. CCA verifies that the company receiving the call has a valid license.

4 CCA routes the call to a workgroup queue where it waits for the ACD (Automatic Call Distribution) Server to assign the call to an agent.

5 When an agent is available, the CTI Server finds the agent's extension. CCA dials the agent's extension, and the IM Server offers the interaction to the agent.

3 Planning a Contact Center

This chapter provides important survey questions that, when answered, provide information necessary when planning a contact center. It includes the following topics:

Using the Administrator's Planning Survey

Whether you are implementing a contact center for your own company, or you are an Application Service Provider (ASP) setting up the contact center services for a customer, carefully planning the contact center operations is the best and quickest way to start.

The *Administrator's Planning Survey* helps you to plan a contact center by presenting questions about how the business is organized and identifying which Contact Center Anywhere (CCA) features to implement. Use the answers to the survey questions to guide you later when you use Administration Manager (AM) to set up the contact center. Use the following pages to record your answers to the Administrator's Planning Survey.

Question 1: What Kinds of Interactions Will the Contact Center Accept?

Use Table 2 to identify how customers will contact the contact center. Place a check mark next to all media types the contact center will accept.

Table 2. Possible Media Types and Descriptions

Check	Media	Description
	Chat	Customers reach the contact center by using your Web site to request a chat (real-time communication) with an agent.
	Email	Customers reach the contact center by writing to an email address.
	Fax	Customers reach the contact center by sending a facsimile transmission.
	Predictive Dialing	The contact center application calls customers on the telephone and connects them to a waiting agent, when successful.
	Preview Dialing	The contact center application calls customers and allows the agent to control the placement of the call.
	Telephone	Customers dial in to the contact center using their telephones.
	Web	Customers reach the contact center by using your Web site to request that an agent call them back on the telephone.

Question 2: What Numbers Will Telephone-Customers Dial to Reach the Contact Center?

Respond to the following questions:

- Customers will dial one telephone number: _________________
- Customers will dial different numbers (Table 3) to reach various phone projects in the business:

Table 3. Phone Projects and Corresponding Telephone Numbers

Phone Project Name	Telephone Number

CCA phone projects allow you to create and save strategies for routing interactions to agents in your contact center. If you plan to accept telephone interactions, you must choose at least one telephone number (DNIS), which customers dial to reach your contact center. If you plan to use different phone projects to handle various customer types with various call routing strategies, you must reserve a unique phone number for each CCA phone project.

Question 3: What Email Addresses Will Email-Customers Use to Contact the Contact Center?

Respond to the following questions:

- My customers will write to one email address: _________________
- My customers will write to different email addresses (Table 4) to reach various contact center projects in my business:

Table 4. Email Address and Corresponding Departments or Workgroups

Email Address	Department or Workgroup

Question 4: What Fax Numbers Will Fax-Customers Use to Contact the Contact Center?

Respond to the following questions:

- My customers will fax to one number: _______________________
- My customers will fax to different numbers (Table 5) to reach various fax projects in my business.

Table 5. Fax Number and Corresponding Department or Workgroup

Fax Number	Department or Workgroup

Question 5: What Web Addresses Will Customers Use to Request a Chat or Callback from an Agent?

Respond to the following questions:

- My customers will access one Web site: _______________________
- My customers will access different Web sites (Table 6) to reach various projects.

Table 6. Web Site Address, Project, and Project Type

Web Site Address	Project Name	Project Type (Chat or Web Callback)

Question 6: How Will the Contact Center Handle Different Types of Interactions?

CCA allows the contact center to manage interactions originating from different media in different ways. For example, customers calling the contact center by phone identify their needs using a menu, and then CCA routes their call to an agent in the correct workgroup. You could, however, direct CCA to route all chat interactions directly to technical support or another workgroup.Consider diagramming the various routes that the interactions take from the moment that they enter your contact center, until they reach their final destination (agent, fax machine, or other resource). Understanding how to route interactions of each media type is important for setting up CCA projects and workgroups using AM.

Question 7: What Are the Workgroup Names, Phone Extension, and Email Address for Each Agent?

CCA lets you route calls to agents in the appropriate workgroup based on the caller's needs. If all agents are serving the same customers, do not divide the agents into multiple workgroups. In this case, you can route all callers to a single workgroup, or directly to an agent's phone extension.

However, if you plan to route callers to the agents working in the functional groups, use Table 7 to define your company's workgroups, and identify which agents belong to which groups.

NOTE: An agent can be a member of multiple workgroup.

Table 7. Agent Names, Workgroups, Extensions, and Email Addresses

Agent Name	Workgroups	Extension	Email Address

Table 7. Agent Names, Workgroups, Extensions, and Email Addresses

Agent Name	Workgroups	Extension	Email Address

Question 8: Will the Contact Center Need Recordings to Greet Customers?

When customers reach your contact center by telephone, there are a number of ways to greet the customer, including:

- **Live operator.** The operator transfers the caller to the appropriate workgroup or agent.
- **Recorded greeting with no routing options.** The caller is immediately placed into a workgroup queue.
- **Recorded greeting with menu options.** The caller is routed to an agent or workgroup queue, based on the selection.

In Table 8, specify a prompt file for each phone number that callers dial to reach your contact center.

> **TIP:** See "Question 2: What Numbers Will Telephone-Customers Dial to Reach the Contact Center?" on page 24.

> **NOTE:** If you plan to organize your contact center agents into workgroups, specify a prompt file that will greet callers entering each workgroup. It is important to identify early, which prompt file and text to use when greeting callers reach each contact center project or workgroup.

Table 8. Project or Workgroup and a Corresponding Sound File or Text Greeting

Project or Workgroup Name	Filename (.wav)	Text for the Greeting or Prompt

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Project or Workgroup Name	Filename (.wav)	Text for the Greeting or Prompt

For more information on recording prompts, see "Recording the Prompt" on page 155.

NOTE: If the contact center plans to have an agent act as a live operator and transfer callers to other agents or workgroups, then a recorded greeting for phone projects is not necessary.

Question 9: Will You Need to Record Prompts Describing Your Touch-Tone Menus?

If the contact center plans to use touch-tone menus to route callers to workgroups, agents, or other resources, then you must create recorded prompts describing the touch-tone options that are available for the caller. It is important, however, to identify which prompt file to use for each menu, and the text that the customer will hear describing the menu options.

Use Table 9 to identify the sound files and prompt text.

Table 9. Sound File or Prompt Text

Filename (.wav)	Text for the Prompt

TIP: Learn how to create menus in "Creating Standard Menus" on page 220 and how to record prompts describing the menus in "Recording the Prompt" on page 155.

Question 10: Will You Need Customized Recordings for Callers Waiting for an Agent?

In addition to the greeting that callers hear when they reach the contact center, there are other recorded messages that they can hear while they are waiting to be connected to an agent.

Prompts describing additional options (such as *Press two to enter your telephone number and receive a callback*) or notifying the caller of the estimated wait time (such as Y*our estimated wait time is one minute*) are examples of Workgroup Queue Prompts.

TIP: See "Workgroup Option Prompts" on page 168.

Although CCA provides prerecorded prompts using a female voice, you can create unique recordings using a different voice or different text.

Question 11: What Skills Will Your Agents Possess for Call Routing?

Agent skills are the abilities that agents possess, which allow them to handle interactions coming into the contact center. CCA matches the needs of the caller with the skills of all available agents and routes the interaction to the agent most qualified to handle the interaction. For example, if your contact center receives callers who speak Spanish and French in addition to English, you might create two agent skills (*Speaks French* and *Speaks Spanish*) to supplement the ability to speak English, which all agents possess. Therefore, when a Spanish-speaking caller reaches the contact center, CCA routes the caller to the available agent with the highest score for the Speaks Spanish skill.

Use Table 10 to identify and describe the agent skills for the contact center:

Table 10. Agent Skills and Corresponding Descriptions

Skill	Description

Question 12: What Statuses Will You Use for Your Agents?

CCA identifies the status of every agent presently logged in to the system. Supervisors use these status indicators to monitor agent activity. Agents depend on their status indicator to control their availability.

If you want additional agent statuses to reflect the activities of the agents in your contact center, identify them in Table 11.

Table 11. Additional Agent Status Indicators and Descriptions

Agent Status	Description or Purpose

TIP: See "Creating an Agent Statuses Library" on page 85 for a list of predefined system statuses.

Question 13: Will Your Agents Read Prepared Scripts?

By compiling a library of prepared scripts, your agents can access important information while providing service to customers. Example scripts include a sales pitch, responses to common questions, a list of troubleshooting steps, or any other information that the agent uses to provide a quality service to the customer.

In Table 12, identify the name, description, and URL (such as *Sales Pitch 1*, *Sales Copy for Ginsu Knife Set*, and *http://mynet.sales.ginsupitch.htm*) for each script you plan to provide your agents.

Table 12. Script Name, URL, and Corresponding Description

Name	Description
URL:	
URL:	
URL	
URL	
URL	

Question 14: Will Your Agents Read from an FAQ?

By compiling a library of FAQ (frequently asked questions), your agents can immediately respond to common questions, ensuring a consistent and quality service to the caller.In Table 13, identify a question (FAQ), answer or supporting URL.

Table 13. FAQ Question, Description, Supporting URL

Question (FAQ)	Answer or Supporting URL
URL:	
URL:	
URL	
URL	
URL	

Question 15: Will Agents Be Allowed to Provide Web Pages for Chat-Based Customers?

Using a library of Web site links, from which agents can select and send to chat-based customers, is an excellent way of quickly pointing customers to the information they need.

In Table 14, list the URLs that agents can use when serving customers.

Table 14. Web Page Name, Description, and URL

Web Page Name	Description and URL
URL:	
URL:	

Table 14. Web Page Name, Description, and URL

Web Page Name	Description and URL
URL:	
URL:	
URL:	

Question 16: Will You Automatically Display Web Pages to Chat-Based Customers?

You can automatically display Web pages (push pages) to customers who request a chat session with an agent.

Use the URL cell in Table 15 to record the URL for each Web page to display for each event, when a customer requests a chat with one of the contact center agents:

Table 15. Chat Event, Name, Description, and URL

Chat Event	Name	Description
1. Waiting		After the customer submits a request for a chat session, this page appears on the screen until the customer is connected with an agent. **TIP:** Suggested content for this page is a *thank you* to the customer for the inquiry, and a notification that an agent will soon contact the customer.
	URL:	
2. Still Waiting		These pages appear after the initial *Waiting* page only if the chat customer is still waiting to be connected to an agent. **TIP:** Suggested content for these pages are product information, answers to frequently asked questions, and so on.
	URL:	
	URL:	
	URL:	
	URL:	
	URL:	
3. Connected		This page appears after the customer successfully connects to an agent.
	URL:	
4. Disconnected		This page appears when the agent disconnects from the chat customer.
	URL:	
No Agents Available		This page appears when no agents are available.
	URL:	

NOTE: You must create the HTML Web pages for each of the events listed in Table 15, and place them on your Web server in the URL location you specify in Table 15.

Question 17: Will Agents Provide Prepared Content to Customers Contacted in Response to a Web Callback Request?

By creating a library of predeveloped Web callback content, agents can respond to customers quickly and consistently. In Table 16, provide a name for the Web callback response content, a description of the content, and the URL containing the text.

Table 16. Web Callback Response Name, Description, and URL

Web Callback Response Name	Description	URL

Question 18: Will Agents Provide Prepared Email Responses to Customers?

Creating a library of predeveloped email responses also allows agents to respond to customers quickly and consistently. In Table 17, identify the subject of the email response, the URL containing the email response text, and workgroup that will use each prepared email.

Table 17. Email Response Subject, Workgroup, and URL

Email Subject	Workgroup	URL

Question 19: Will Your Agents Provide Prepared Fax Responses to Customers?

You can create a library of predeveloped fax responses for your agents to provide customers. Providing agents with prepared faxes of the forms most frequently requested of them allows the agents to respond to your customers quickly and consistently. In Table 18, identify the name of the fax response, and the path and filename containing the fax contents.

Table 18. Fax Name and Corresponding File

Fax Name	Filename (.TIF or .TIFF)

CAUTION: You must store CCA fax responses as Tagged Image File Format (TIFF) files in the Fax Library. When saving fax responses, select Class F with CCITT Group 3 1D compression to ensure compatibility with CCA and the telephony hardware.

Question 20: Will You Track Interaction Results?

Tracking the results of contact center interactions is a good way of measuring and comparing the performance of agents. With the outcomes feature enabled, you can create administrative reports to analyze the results of all interactions handled by agents.

You can configure CCA to automatically display the outcome library and require agents to choose an outcome at the conclusion of every interaction. In Table 19, identify the outcome you create for the Outcome Library. (Some example outcomes are *Placed Order*, *Issue Resolved*, *Issue Pending*, and so on.)

Table 19. Outcomes and Descriptions

Outcome	Description

Table 19. Outcomes and Descriptions

Outcome	Description

Question 21: Will You Send an Automated Email Acknowledgment to Email Customers?

You can create a library of predeveloped email content that CCA can send automatically to customers who reach the contact center by email. Typically, the content of the automated reply email is something like *Thank you for your inquiry, an agent will be contacting you shortly*. In Table 20, identify the subject of each automated email reply that you use with the contact center.

Table 20. Auto Email Response Filename and Description

Automated Email Acknowledgment Name	Filename	Description

Question 22: What Email Servers Will the Contact Center Use to Receive Emails from Customers?

CCA allows you to specify multiple email servers for automatic load balancing of email traffic. Identify the email servers in Table 21.

Table 21. Email Servers, Hosts, Usernames, and Passwords

POP3 Servers	Host	Username	Password

Table 21. Email Servers, Hosts, Usernames, and Passwords

POP3 Servers	Host	Username	Password

Question 23: What Email Servers Will Contact Center Agents Use to Send Emails to Customers?

CCA allows you to specify multiple email servers for automatic load balancing of email traffic. Identify them in Table 22.

Table 22. SMTP Servers, Hosts, and Domains

SMTP Servers	Host	Domain

Question 24: Will Some or All Agents and Supervisors Connect to the Contact Center Through a Proxy Server?

CCA supports agent and supervisor workstation connections through a proxy server. Use Table 23 to list the proxy servers to which agents and supervisors will connect.

Provide the server name, the name of the host on which each proxy server resides, and the authentication information necessary to connect to the proxy server.

Table 23. Proxy Server Name, Host Name and Authentication Information

Proxy Server Name	Proxy Server Host Name	Authentication Information
		Username:
		Password:
		Domain:
		Username:
		Password:
		Domain:
		Username:
		Password:
		Domain:

TIP: Also see "Setting Internet and Intranet Security" on page 325 to change proxy settings in Internet Explorer.

4 Getting Started with Administration Manager

This chapter describes how to launch Administration Manager (AM) and configure the necessary settings when setting up a contact center for the first time. It includes the following topics:

- Process of Setting Up Your Contact Center in Administration Manager
- Synchronizing Server Time and Time Zone
- Starting Administration Manager and Logging In
- About Setting the Agent's Proxy Information
- Changing the Agent's Proxy Information
- Configuring Administration Manager

NOTE: Make sure to complete the *Administrator's Planning Survey* (see Chapter 3, "Planning a Contact Center") and keep the responses to hand.

Process of Setting Up Your Contact Center in Administration Manager

AM supports a large number of features, options, and settings. You can configure many of the features in AM at any time. For example, you can add Intelligent Email Templates after the contact center is up and running. However, you must perform some configuration tasks in AM in a specific order. For example, you must have your POP3 server information to hand before you configure your company and agents.

To get a simple contact center up and running, perform the following tasks:

1. "Process of Creating a Partition Library" on page 135.

   CCA allows customers to segment their configurations within a single company on the system. This segmentation is called a *partition*.

2. "Creating a DNIS Library" on page 123.

   Create a list of DNIS (Dialed Number Identification Service) phone numbers. DNIS is a service that tells the recipient of a telephone call the telephone number dialed by the person making the call. It is used by contact centers hosting multiple numbers, voicemail systems and ISPs offering shared dial-in services.

3. "Adding Email Interactions to a Project" on page 328.

   Create email accounts using your company Mail Server for the following:

   - All of your agents, supervisors, and other administrators
   - Your company voicemail, fax, alarm notification, and storage

- Your projects

4 “Configuring Administration Manager” on page 45.

Log in to AM and configure the administration settings (including the time zone and a few other settings).

5 “Creating a POP3 Server Library” on page 143.

6 “Creating an SMTP Server Library” on page 149.

7 “Creating an SMTP Groups Library” on page 148.

8 “Adding and Editing a Company” on page 47.

If you are allowed, create and configure a new company in AM for each company for which you provide services.

9 If you need to set up only one contact center for your company, you will find that your company already exists in AM and you only need to configure it.

NOTE: If you need to set up only one contact center for your company, CCA is provided with your company already created in AM. Thus, you only need to configure your preferences.

10 “Creating an Agent Skills Library” on page 84.

11 “Creating User Accounts” on page 183.

12 “Creating a Workgroup” on page 202.

13 “Creating a Project Definition” on page 291.

Synchronizing Server Time and Time Zone

It is critical that all CCA Server machines are set to the same time (date and time properties for window machines). If one or more servers are not set to the same time as the other servers, severe operational errors might occur, including failures of master backups and scheduled activities.

It is recommended that you set up all servers to run at the same time in the GMT time zone. If you do not want all of your servers to use the same time zone, make sure that they are still synchronized. For example, if you have a server in San Diego and another in London, and both are running in local time zones, and the San Diego server time is 12:00 noon, Then, you must set the London server to 8:00 P.M. (because London is 8 hours ahead of San Diego).

Starting Administration Manager and Logging In

The first time you use AM, you must use your browser to open the AM Login screen, much as you load a typical Internet Web site in a browser.

TIP: If you are logging in through a proxy server, or want to set up CCA to use a proxy server, see “Process of Setting Up Proxy Servers” on page 199.

Launching Administration Manager the First Time

To launch AM the first time

1. Start Internet Explorer (version 6.0 or later).

   NOTE: You need Internet Explorer, version 6.0 or later, to launch the application the first time, to access the application's online help, and to display pages.

2. Enter the address of the AM program that was provided by Oracle or by your service provider. The Welcome screen opens.

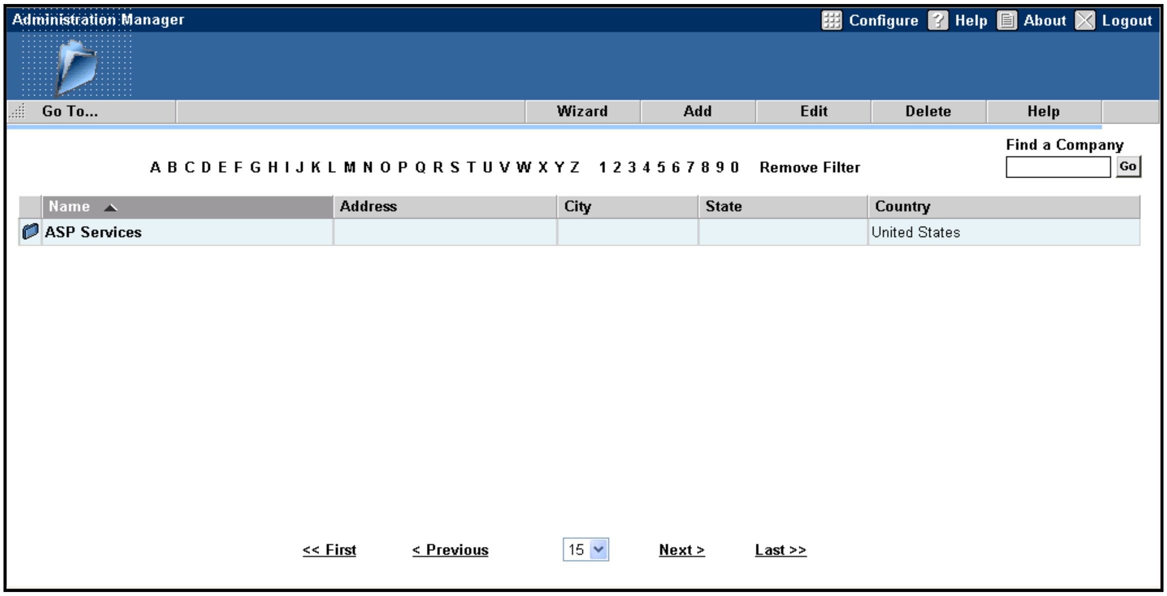
   TIP: Add this page to your Internet Explorer Favorites menu.

   a. If your version of CCA allows:
      - Type `system` in the Company Alias text box.
      - Type `netadmin` in the User name text box.
      - Type the password (provided by Oracle) in the Password text box.

   b. If you are using one company:
      - Type the Company alias (supplied by your vendor or Application Service Provider).
      - Type the user name and password that were supplied by your vendor or Application Service Provider.
      - From the drop-down list, choose your Language. (All AM session screens appear in the language you choose.)

3 Click the Administration Manager icon.

The AM screen opens to either the Company List screen or the Company Profile screen, depending upon which version you are using.



NOTE: You see either the Company List screen or the Company Profile screen, depending upon your configuration.

About Setting the Agent's Proxy Information

A proxy server is a program that acts an intermediary between computers on your Local Area Network (LAN) and computers on the Internet. Since the proxy server does all of the data requesting, each workstation must be configured to make all Internet requests from the proxy server and not the Internet. CCA gets proxy information directly from the agent's browser.

Changing the Agent's Proxy Information

To change the agent's proxy information

1 Start Internet Explorer. From the Tools menu, choose Internet Options.

2 In the Internet Options dialog box, select the Connections tab, then click the LAN Settings button.

3 In the Local Area Network Settings dialog box:

a. Select the Use a Proxy Server for Your LAN check box.
b. In the Address text box, type the IP address of the proxy machine.
c. In the Port text box, type the proxy machine port number, and click OK.

Configuring Administration Manager

To configure your AM workstation, perform the following tasks:

- Process of Setting Up Your Contact Center in Administration Manager
- Setting Your Inactivity Timeout

Setting Your Regional Options (Language, Time Zone, Date Format)

If you work in a time zone that is different from most of your agents or your company headquarters, you might want to configure your settings to match their time zone and date format.

To set your regional options

1. Click the Configure link (top right), and then click the Regional Options tab.
2. From the Select Language drop-down list, select your language, and click OK to save your configuration settings.

   All AM screens display text in the language you selected.

Setting Your Time Zone and Date Format

If you work in a time zone that is different from most of your agents or your company headquarters, you might want to configure your workstation settings to match their time zone and date format.

To set your time zone and date format

1. Click the Configure link (top right), and then click the Regional Options tab.
2. Do one of the following:
   - To set your time zone to the same time zone defined for your company, choose Company Defined Time Zone.
   - To set a specific time zone, choose User Defined Time Zone, and then select a time zone from the Set Time Zone drop-down list.
3. Do one of the following:
   - To set your date format to the same date format defined for your company, choose Company Defined Date Format.

- To set a specific date format, choose User Defined Date Format, and then choose a format from the Set Date Format drop-down list, and click OK to save your configuration settings.

All AM screens display the times and dates in the zone and format you selected.

Setting Your Inactivity Timeout

You can set an inactivity timeout for AM, so that if AM sits idle (that is; there are no mouse clicks or keypresses) for the period you specify, AM automatically logs you out.

To set your inactivity timeout

1. Click the Configure link (top right), and then select the Timeout tab.
2. In the Timeout After text box, enter the number of minutes after which AM automatically logs you out, and click OK to save your configuration settings.

5 Adding and Editing a Company

This chapter describes how to add and edit a company using the company packages (feature sets) and the Company Creation Wizard, or by manually entering information into each screen. This chapter includes the following topics:

- About Company Definitions
- Process of Adding a Company Definition
- About Company Packages
- About Creating a New Company
- Managing Company Profile Information
- Process of Finding a Company
- Process of Sorting Columns of Information
- Process of Enabling Telnet

About Company Definitions

If you are an Application Service Provider (ASP) setting up a contact center for a customer, you must create a *Company Definition* to hold the settings and definitions for the customer's contact center. You must create one company for each customer for whom you are providing contact center application services.

NOTE: Make sure to complete *Administrator's Planning Survey,* and keep the responses to hand.

> **TIP:** See Chapter 3, "Planning a Contact Center."

You can create a Company Definition in two ways:

- Create a company package, and use the Company Creation Wizard to activate and deploy feature sets for a new tenant customer.

  The wizard uses the information in the company packages to identify and deploy the various contact center feature offerings. The wizard also includes licensing information and the default ANI for the project.

  CAUTION: For the Company Creation Wizard to work properly, your system must be able to limit the supervisor licenses.

- Enter information manually in each of the appropriate CCA screens.

Process of Adding a Company Definition

Whether you are using the Company Creation Wizard or manually entering information to add a company definition, perform the following tasks:

- "Managing Company Profile Information" on page 64.
- "Configuring Company Time Zone and Date Format" on page 65.
- "Setting Company Business Hours" on page 66.
- "Providing Custom Web Applications Access to Company Database Tables" on page 67.
- "Enabling SIP Billing" on page 67.
- "Integrating CRM With the Internet or a Win32 Application" on page 68.
- "Enabling or Disabling Applet Console Configuration Settings (Troubleshooting)" on page 72.
- "Adding or Removing Company Configuration Features" on page 74.
- "Changing the Login Policy" on page 76.
- "To restore a user's access after a permanent lock out" on page 78.
- "Completing the LDAP Authentication Policy" on page 78.
- "What to Do If the Test LDAP Connection Fails" on page 79.
- "Adding Agents When Using LDAP Authentication" on page 79.
- "Controlling Company Licensing" on page 80.
- "Storing Voicemails (Unified Messaging)" on page 81.
- "Process of Sorting Columns of Information" on page 82.

About Company Packages

If you plan to use the Company Creation Wizard or if the new company plans to run Predictive or Preview projects, you must create and save one or more company packages to identify the specific contact center feature sets and media types.

CAUTION: If the company you are creating plans to run Predictive or Preview projects, you must create a package containing these features. You cannot manually add Predictive or Preview projects to a company. (You can still, however, manually add predictive calling to a project.)

When a company package exists, you can use the Company Creation Wizard to apply the package to the new tenant company. Later, you can change the feature sets within a company package and CCA will automatically apply the changes to the company.

NOTE: Company package changes are not dynamic, which means users must log out and back in to the application to see the new changes.

This section includes the following information about Company Packages:

- "Full Feature Package" on page 49.
- "Example of Possible Feature Sets" on page 54.

- "Creating a Company Package" on page 55.
- "Finding a Company Package" on page 56.
- "Editing a Company Package" on page 57.
- "Setting Company Business Hours" on page 66.
- "Deleting a Company Package" on page 57.

Full Feature Package

The Full Feature Package includes the features in Table 24:

Table 24. Full Feature Package

Feature	Description
ASP Model	The Application Service Provider (ASP) model is for managing and distributing software-based services and solutions to customers across a wide area network from a central data center. An ASP requires a network administrator login. The Enterprise model requires a system administrator login.
Billing Report	The Service Billing Report By Project Report shows transaction times and billing rates by project, for a specified date range. **TIP:** For more information, see *Contact Center Anywhere Reports*.
CRM	Allows companies to load a unique Web page into a custom tab, or use an external application tab for launching a separate browser on the agent's machine. Companies can then either load a unique Web page into that browser, or launch a Win32 application on the agent's machine. To use this feature, select Options and then Company. Then, select the CRM Integration tab. **TIP:** For more information, see "Integrating CRM With the Internet or a Win32 Application" on page 68.
Data Sources	Companies can customize the Contact record that the system uses to identify the Contact data structure and location. Data sources work with the display template feature, which lets users change how to display contact data to agents and supervisors. To use this feature, select Libraries and then Data Source. Then, select the Departure Reason tab. **TIP:** For more information, see "Creating a Data Source Library" on page 93
Departure Reason (when configured)	Information about when and why an agent left the company. To use this feature, selecting Options and then the Agents option. **TIP:** For more information, see "Deleting an Agent Account" on page 198.

Table 24. Full Feature Package

Feature	Description
Dialing Out	Allows the company to control whether agents can make outbound calls and under what conditions. To use this feature, navigate to the Company Configuration tab, Allow Outbound Calls drop-down menu selection by selecting Options and then the Company option. **TIP:** For more information, see "Dialing Out" on page 54 and "Allow Outbound Calls" on page 75.
Dialogic Extension	Allows the company to display the phone type Dialog Analog Extension option for agents. To use this feature, select Options and then Agents. Then, select the Phone tab, and under Select Type of Phone, select the Dialogic Extension (MSI ID) option. **TIP:** For more information, see "Dialogic Analog Extension" on page 192.
Email	Companies can control whether to send and receive emails.
Graphical Data Representation	All Supervision Manager views (except the Interaction view) provide the option to create two-dimensional graphical representation of data (a line chart, bar chart, or pie chart). **TIP:** For more information, see the *Contact Center Anywhere Supervision Manager Guide*.
H323 (when configured)	Companies can use an H323 phone type. To use this feature, select Options, then Agents, and then Phone. Then, under Select Type of Phone, check the H323 option. **TIP:** For more information, see "H323" on page 192.
Hired Date (when configured)	To use this feature, select Options and then Agents. Then, select the Profile tab. **TIP:** For more information, see Table 44 on page 185.
Intelligent Email Templates	Companies can use Intelligent Email Templates to scan incoming email interactions for specific keywords, so that the agents can then send automatic responses, or provide suggested responses. To use this feature, select Libraries and then Intelligent Email Templates. **TIP:** For more information, see "Creating an Intelligent Email Template Library" on page 129.

Table 24. Full Feature Package

Feature	Description
IVR Server	Companies can transfer their callers to a custom Interactive Voice Response (IVR) system. To use this feature, select Options and then Project Menus. Then, select the Touch Tones tab, and the Route to IVR Server option. **TIP:** For more information, see “Route to IVR Server” on page 223.
Limit Call Recording Percentage	Companies can allow the application to randomly record agent interactions automatically. This feature sets the recording to occur for a defined percentage of all interactions. To use this feature, select Options and then Agents. Then, select the Controls and Restrictions tab and the Enable automatic recording of Agent check box, and then the Percentage of call to record from the drop-down list. **TIP:** For more information, see “Enable automatic recording of Agent” on page 187.
Outside Phone	Companies can use an outside phone type (remote extension) for remote agents. To use this feature, select Options and then Agents. Then select Phone, and under Select Type of Phone, choose the Outside Phone option and enter an associated country code and phone number. **TIP:** For more information, see “Outside phone” on page 192.
PBX (when configured)	Companies can use a Public Branch Exchange (PBX) phone type. To use this feature, select Options and then Agents. Select Phone and then under Select Type of Phone, select the PBX option and enter its associated exchange. **TIP:** For more information, see “PBX” on page 192.
Pilot Number Library	Companies can create a directory of numbers or Pilot Numbers to use with automatic number identification (ANI) routing of outbound calls. To use this feature, select Libraries and then ANI Library. **TIP:** For more information, see “Creating an ANI Library” on page 89.
Predictive (when configured)	Companies can run predictive projects, in which the application places outgoing calls to customers (or prospective customers) automatically. When the dialer detects busy signals, answering machines, or a ring with no answer, it puts the number back in queue. To use this feature, select Options and then Projects. **TIP:** For more information, see “Adding Predictive Calling to a Project” on page 300.

Table 24. Full Feature Package

Feature	Description
Preview (when configured)	Companies can run preview projects where the contact center application calls customers, and allows the agent to control the placement of the call. To use this feature, select Options and then Projects. **TIP:** See Chapter 15, "Creating Projects."
Proxies	**TIP:** See "About Setting the Agent's Proxy Information" on page 44.
Quality Recording	Allows the company to record interactions. To use this feature, select Options and then Agents. Then, select the Controls and Restrictions tab. **TIP:** For more information, see "Allow call recording In Interaction Manager" on page 187 and "Enable automatic recording of Agent" on page 187.
Simple CRM - Contacts	You can provide simple CRM in a company definition. Simple CRM removes the Contacts tab in the agent's Interaction Manager interface. To use this feature, select Options and then Company. Then, select the CRM Integration tab. **TIP:** For more information, see "Integrating CRM With the Internet or a Win32 Application" on page 68.
SIP	Companies can use a SIP (Session Initiated Protocol) phone system. To use this feature, select Options and then Agents. Select Phone and then, under Select Type of Phone, select SIP. **TIP:** For more information, see "SIP" on page 192.
SQL Queries in project menus	Companies can run SQL statements against any SQL Server or Oracle database to retrieve or update data. Select Options and then Project Menus. Select the Menu tab and then the Menu type. **TIP:** See "Creating SQL Query Menus" on page 236.

Table 24. Full Feature Package

Feature	Description
System Prompts	Allows companies to use all prerecorded system prompts (sound recordings) throughout the application. System prompts are general recordings provided with the application. They include contact center prompts, date and time prompts, number prompts, agent voicemail prompts, company directory navigation prompts, project option prompts, workgroup option prompts, and call blocking prompts. Select System Prompts and then Call Center, Date/Time, Numbers, Agent Voicemail, Company Directory, Project Options, Workgroup Options, or Call Blocking **TIP:** For a complete list of the supplied system prompts, see "Listing All Prompts by Filename" on page 173.
Voice Callback	Companies can allow callers to leave a voicemail requesting a callback from an agent at a later time. To use this feature, select Options, then Workgroups, and then the Options tab. This feature is also accessible by selecting Options, then Company, and then the Licensing tab. **TIP:** For more information, see "Allow customer to request a callback" on page 207 and "Interaction Limitations" on page 80.
Voicemail	To use this feature, select Options and then Company. Then, select the Unified Messaging tab. **TIP:** For more information, see "Storing Voicemails (Unified Messaging)" on page 81.
Web Callback	To use this feature, select Options and then Company. Then, select the Licensing tab. **TIP:** For more information, see "Controlling Company Licensing" on page 80.
Web Chat	To use this feature, select Options and then Company. Then, select the Licensing tab. **TIP:** For more information, see "Controlling Company Licensing" on page 80.
Workgroup Prompts	To use this feature, select Options and then Projects. Then, select Workgroup Prompts tab. **TIP:** For more information, see "Ordering of Workgroup Prompts" on page 170 and "Setting Workgroup Options" on page 206.

Example of Possible Feature Sets

You can create separate company packages by including or limiting the various feature sets. Table 25 shows four types of example company packages, and the feature set that each includes.

NOTE: Table 25 provides the default, minimum feature set for the initial setup of a company. You must manually set up other features, if required. See "About Company Packages" on page 48.

Table 25. Example Packages and Their Feature Sets

Feature Sets	Example Company Packages			
	Base Package	Base and Outbound	Base and Multimedia	Base and Call Recording
ASP Model	No	No	No	No
Billing Report	Yes	Yes	Yes	Yes
CRM	Yes	Yes	Yes	Yes
Data sources	No	No	No	No
Departure Reason	Yes	Yes	Yes	No
Dialing Out	Yes	Yes	Yes	Yes
Dialogic Extension	Yes	Yes	Yes	Yes
Email	Yes	No	Yes	No
Graphic/Chart Reports	Yes	No	Yes	No
H323	Yes	No	No	No
Hired Date	Yes	Yes	Yes	No
Intelligent Email Templates	Yes	No	10	No
IVR Server	Yes	No	Yes	No
Limit Call Recording Percentage (33%)	Yes	No	Yes	Yes
Outside Phone	Yes	Yes	Yes	Yes
PBX	Yes	No	No	Yes
Pilot Number Library	Yes	Yes	Yes	Yes
Predictive	Yes	No	Yes	No
Preview	Yes	No	Yes	No
Proxies	No	No	No	Yes
Quality Recording	Yes	No	No	Yes
Simple CRM - Contacts	Yes	Yes	Yes	Yes

Table 25. Example Packages and Their Feature Sets

Feature Sets	Example Company Packages			
	Base Package	Base and Outbound	Base and Multimedia	Base and Call Recording
SIP	Yes	No	Yes	No
SQL Queries in Project Menus	No	No	No	Yes
System Prompts	Yes	No	Yes	Yes
Voice Callback	Yes	No	Yes	Yes
Voice Mail	Yes	No	Yes	Yes
Web Callback	No	No	No	Yes
Web Chat	No	No	Yes	No
Workgroup Prompts	No	No	Yes	No

Creating a Company Package

When you create a company package, the package creates its own library of specific feature sets. For more information on libraries, see Chapter 6, “Creating CCA Libraries.”

NOTE: You must have network administrator permission to create a package.

To create a company package

1 Log in as a network administrator.

TIP: See “Starting Administration Manager and Logging In” on page 42.

2 When the Company List screen (or the Company Profile screen) appears, click Go To, and select Package Creator from the drop-down list. The Company Package List screen opens to show a list of all existing packages.

3 From the Company Package List screen, click Add. The Add Company Package screen opens.

4 In the Name and Description boxes, type a name and description for this new package.

The name and description appear on the Company Package List screen.

5 Select the features that you want to include in this package. Notice that many default options are already selected. To remove the check mark, select the box, and click OK.

TIP: See the definitions provided in "Full Feature Package" on page 49.

NOTE: The Company Creation Wizard uses this package definition to populate the Company Configuration drop-down list for this new company.

CAUTION: When you enable or disable a feature, you are adding or removing system capabilities.

The Company Package List screen reappears, showing your new package.

6 Later, when you create the company using the Company Configuration tab, you will select the company package from a drop-down list

TIP: See "Adding or Removing Company Configuration Features" on page 74.

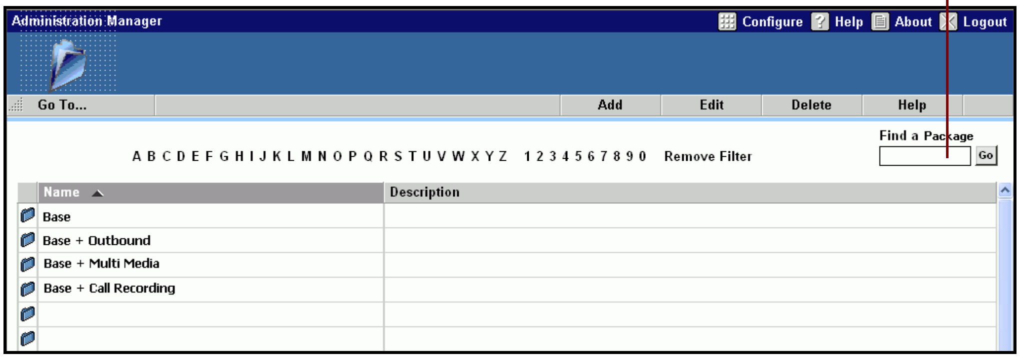
Finding a Company Package

To determine which features are enabled or disabled for a company, locate the Company Package associated with that company.

To find a company package

1 From the Company Package List screen, type all or the first part of the package name into the Find a Package box.

Find a Package



NOTE: You cannot use a wildcard.

2 Click Go.

All packages with matching names appear in the list.

Editing a Company Package

After you find the Company Package associated with your company of interest, you can enable or disable CCA features.

To edit a Company Package

1. From the Company Package List screen, click Edit. The Add Company Package screen appears.
2. Click the check box next to each feature to add it. Features without checks are not included, and click OK.

   The package changes to include only the features you selected.

   NOTE: Agents, supervisors, and anyone already logged into the CCA application must log out of the application and log in again before they will see the changes.

CAUTION: You will not be able to delete a package if a company is using it. You must first delete the package from the Company Package List screen.

Deleting a Company Package

You can easily delete a Company Package.

To delete a Company Package

1. From the Company Package List screen, click Delete.

   A confirmation message appears.

2. Click OK to delete the package.

About Creating a New Company

You can create a new company using two methods:

- "Creating a New Company Using the Company Creation Wizard" on page 58.
- "Configuring a New Company Profile Manually" on page 64.

Creating a New Company Using the Company Creation Wizard

Create a new company by using the Company Creation Wizard, which gathers initial information required for a new company, and combines it with the company package. When doing so, the Wizard enables and disables feature sets. The Wizard also prompts you for the ANI requirements, and then creates the definition.

NOTE: Use the Company Creation Wizard to create the initial setup of a company. You must manually set up other features, if required. See "About Company Packages" on page 48.

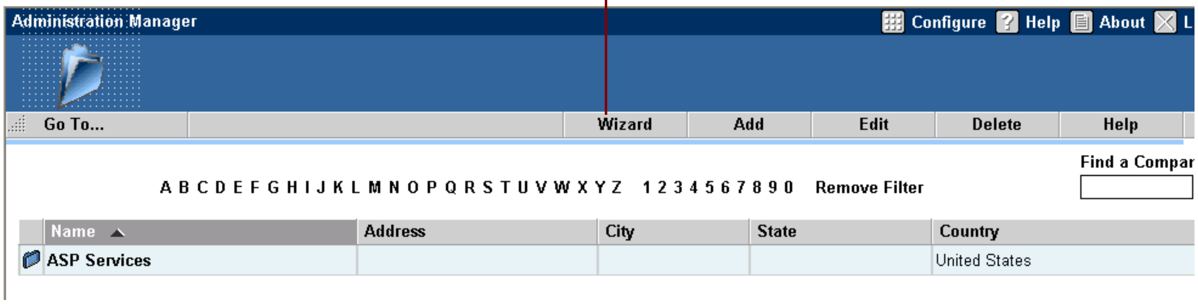
NOTE: You can still create a company manually by following the instructions provided in "Configuring a New Company Profile Manually" on page 64.

To create a new company using the Company Creation Wizard

1. From the List of Companies screen, click the Wizard button.

   TIP: If you are in another area, such as Package Creation, click Go To, and select List of Companies.

Wizard Button



   The New Company screen opens in the Profile area.

2. Use the following table to complete any missing information in the applicable fields:

Field	Description
Company Name	(Required) Type the full name of the company for which you are providing contact center services.
Company Alias	(Required) Type a unique identifier for this company. **NOTE:** CCA uses this alias to differentiate companies in the database, so you must provide a unique alias for each company.

Field	Description
Display Name	(Required) Type the name to display for this company on the CCA Company List screen. **NOTE:** The display name does not appear elsewhere in the system or in any CCA reports. **TIP:** If you administer a large number of companies (including companies with foreign-language names), enter a value that is intuitive to make it easier to locate the company from the Company List. **NOTE:** This field accepts only Latin (ASCII) characters.
Address	Type the street address for the company for which you are providing contact center services.
City	Type the city where the company for which you are providing services is located.
County	Type the county or region where the company for which you are providing services is located.
Country	From the drop-down list, choose the country where the company for which you are providing services is located.
Post Code	Type the ZIP code or postal code in which the company that you are providing services for is located.
Web Site	Type the URL of the Web site for the company for which you are providing services.
Statistics	Do not enter any values in these fields. For the most part, these fields summarize the settings that you can perform later. For example, later you create accounts for your agents. After you create your agent accounts, the system updates the agent’s field in the Company - Profile tab, showing how many agent accounts you created.

Field	Description
Inactive Session Timeout: Disable Session Timeout	Click this option so that CCA will never automatically log out users (agents, supervisors, and administrators).
Inactive Session Timeout: Enable Session Timeout	Select a timeout value between 5 minutes and 24 hours. This is the period when CCA automatically logs out a user after inactivity. This timeout value applies to the agents, supervisors, and administrators. You can enter a time for the entire company. If you change the session timeout at the company level, AM requests whether you want to apply the change to all users: ■ If you apply the change to all users, CCA changes the session timeout for all users to the new company value. ■ If you do not apply the change to all users, existing users will keep their current, session-timeout value. New users will get the new company session timeout value. **NOTE:** To apply an inactive timeout to an individual user, use the Inactive Session Timeout from the Options, Agents, Controls and Restrictions tab. **TIP:** See "Inactive Session Timeout" on page 188.

3. Click Next. The screen changes to show Contact information.
4. Make sure the company contact fields have enough information to contact the person in charge of the contact center at the customer's site.
5. Click Next. The screen changes to show a list of existing packages. (Each package identifies a specific contact center feature set.)

   TIP: For more about packages, see "About Company Packages" on page 48.

6. Select the package containing the feature set for this company, and then click Next. The screen changes to show Licensing information.

7 Use the information in the following table to make sure to complete any fields that might be missing information:

Field	Description
Maximum Number of Simultaneous Interactions Permitted for this Company	For each company that you provide service, type the maximum number of interactions that the company can have at the same time.
Apply for Voice Interactions Only	Leave this box unchecked to tell CCA to count all interactions when calculating the total for the previous field. For example, if the previous field value is 400, then CCA allows the company a total of 400 interactions of any kind at the same time. Select this check box to give the company unlimited noncall interactions while still setting a limit on their call interactions. The company can have as many fax, voicemail, email, and chat interactions as the company wants at the same time. However, the company can have only a limited number of call interactions at the same time (ACD call, inbound or outbound extension, direct inbound/ outbound).
Interaction Limitations	(Required) You can limit or reserve the license slots for online, offline, and chat interactions. The limitations are by company and defined by network administrator permission. These thresholds, in combination with the Peak Interactions Report, allow you to better track and allocate your system licenses. Type the maximum number of interactions the company can have at the same time for Online (voice calls, ACD callback, and Web callback), Offline (email, ACD fax, and voicemail), and Chat. **NOTE:** You must assign at least one interaction to a Media Type.
Maximum Number of Logged In Users	Type the maximum number of agents that the company can have logged in to the system at the same time. **NOTE:** CCA does not include supervisors and administrators in this count.
Maximum Number of Logged In Supervisors	Type the maximum number of supervisors that the company can have logged in to the system at the same time. **NOTE:** CCA does not include agents and administrators in this count.
Maximum Number of Channels Allowed to be Used by a Predictive Campaign	Type the maximum number of channels that a Predictive Campaign can use. **NOTE:** This number limits the impact that Predictive dialing has on channel use.

8 Click Next. The screen changes to show the Regional Settings information.

9 Use the information in the following table to complete the applicable fields:

Field	Description
Date Format	From the drop-down list, select a date format for the company. **NOTE:** CCA uses the selected format when displaying dates on all the agent, supervisor, and administrator workstations for the company (unless users override the company settings from their own workstations).
Time Zone	From the drop-down list, select a time zone for the company. **NOTE:** The company time zone appears on the workstations of all company's agents, supervisors, and administrators (unless the users override the company settings on their own workstations).
Select a Language	From the drop-down list, select the language for the internal messages used by the company. Internal messages can be: ■ Email alarms from the server ■ The default language selected for reports **NOTE:** The company language selection does not affect what agents and supervisors see when they log in. Agents and supervisors can select their own language preference each time that they log in.

10 Click Next.

The screen changes to show the Business Hours information.

11 Do the following:

a Under Opening Days, check each day when the company is open for business and when agents are available to handle Web callback requests.

b For each day you check, select the time (hours and minutes) that the company opens on that day from the Opening Hours From drop-down list. Or, select 24 Hours if the contact center is always available for handling chat and Web callback interactions.

c Identify the time (hours and minutes) that the company closes on each day from the To drop-down list.

CAUTION: Before agents and supervisors can log in to the company, your network administrator must add the required servers and resources for the company to the machine hosting your CCA installation.

12 Click Next. The screen changes to show the Email Configuration options.

NOTE: You must enter data in the fields on the Email Configuration screen.

13 Use the information in the following table to complete the Email Configuration - General Addresses fields:

Field	Description
Voice Mail address	Type the email address to use as the return address on emails sent to agents, which contain voicemail attachments. So, if there is a problem delivering an email containing a voicemail attachment to the agent, CCA sends the email and attachment to this address.
Fax to Agent	Type the email address to use as the return address on emails sent to agents, which contain fax attachments. So, if there is a problem delivering an email containing a fax attachment to the agent, CCA sends the email and attachment to this address.

Alarm notification to Supervisor	If an email error occurs, CCA sends an alarm notification to this address. This might happen when:
	■ An email could not be sent to an agent.
	■ An email could not be parsed. (For example, the email body was corrupt.)
	■ The agent accepts the email interaction, and then discards it without replying. (CCA forwards the email to the alarm address.)
	■ The Company Storage Email Address changed. If the storage changes, CCA sends an alarm notification to the alarm address and requests that the administrator forward all emails from the old storage address to the new storage address.
	■ The CCA server could not connect to the project's POP3 server.
	■ Emails were routed to a project and then the project was deleted. In this case, CCA forwards all of the emails for this project to the alarm address.
	■ The agent did not answer an email in time.
	■ The project mailbox received an email from an invalid email address. CCA forwards these emails to the alarm mailbox.
	■ The project received an invalid email from an agent, for example:
	    ■ The agent's email address was invalid.
	    ■ The agent responded to an interaction that was already answered.

14 Click Next. The screen changes to show ANI (automatic number identification) information.

TIP: See "Creating an ANI Library" on page 89 for more information.

15 Do the following:

a. To add additional information, click Plus.

   A new row opens.

b. Type the new ANI number and description in the respective boxes.

16 Click Next. The screen changes to show SIP Billing information.

Contact centers use the SIP Billing tab for making outbound SIP calls, using a billing module that connects to the SIP software proxy. The billing module examines the Diversion field of the SIP header to determine how to bill the call.

TIP: See "Enabling SIP Billing" on page 67.

a. Do one of the following:

   - If your billing module expects to find a string in the SIP header for Outbound SIP calls, enter the string value in the Outbound Call field.
   - If your billing module expects to find a string in the SIP header for calls that are routed to an agent, enter that string value in the User Call field.

17 Click Next. The Finish screen opens to display a Create Company button.

18 Click the Create Company button and wait. The List of Companies screen reappears, displaying your new company's name and information in the list.

Configuring a New Company Profile Manually

You can still configure a new company manually, if you prefer. Use the Profile tab to supply or edit the name, address, and Web site of your company (or of the company for which you are providing contact center services).

To configure a new company profile manually

1 Log in to AM.

TIP: See "Starting Administration Manager and Logging In" on page 42.

2 Do one of the following:

- To create a new Company definition, click Add.
- To modify an existing Company, click the row for the Company, and then click Edit. The Company screen opens to the Profile tab.

3 Complete or edit the fields in the Company Profile tab, and click OK to create the new company.

Managing Company Profile Information

After selecting a company, use the tabs from the Options, Company selection to manage various company profile settings. The Company tabs enable you perform the following tasks:

- "Adding, Editing, and Viewing Company Contact Information" on page 65.

- "Configuring Company Time Zone and Date Format" on page 65.
- "Setting Company Business Hours" on page 66.
- "Providing Custom Web Applications Access to Company Database Tables" on page 67.
- "Enabling SIP Billing" on page 67.
- "Integrating CRM With the Internet or a Win32 Application" on page 68.
- "Enabling or Disabling Applet Console Configuration Settings (Troubleshooting)" on page 72.

Adding, Editing, and Viewing Company Contact Information

From the Contact tab, you can add, edit, or view the names, addresses, and telephone numbers for the contact persons at your company (or at the company for which you are providing contact center services).

To edit company contact information

1. Select Options, Company, and then the Contact tab.
2. Complete the company contact fields with the information necessary to contact the person in charge of the contact center at the customer's site, and click Apply.

Configuring Company Time Zone and Date Format

Use the Regional Settings tab to set the time zone and date format to use on all CCA workstations in your company.

To configure company time zone and date format

1. Select Options, Company, and then the Regional Settings tab.
2. Use the information in the following table to complete the Regional Settings information, and click OK:

Field	Description
Date Format	From the drop-down list, select a date format for the company. CCA uses the selected format when displaying dates on all agent, supervisor, and administrator workstations for the company (unless users override the company settings from their own workstations).

Field	Description
Time Zone	From the drop-down list, select a time zone for the company. The company time zone appears on the workstations of all company's agents, supervisors, and administrators (unless the users override the company settings on their own workstations).
Select Language	From the drop-down list, select the language for the internal messages used by the company. The internal messages can be: ■ Email alarms from the server. ■ The default language selected for reports. **NOTE:** This company language selection does not affect what agents and supervisors see when they log in. Agents or supervisors can select their own language preference each time that they log in.

Setting Company Business Hours

Use the Business Hours tab to identify the days and times when the company is open for business, and the days and times when the agents are available to handle chat and Web callback requests.

When a Web-based customer attempts to contact your contact center during nonbusiness hours, CCA uses the specified business hours to inform the customer that the company is currently closed, and to assist the customer in reaching an agent during open business hours.

To set company business hours

1. Select Options, Company, and then the Business Hours tab.
2. Under Opening Days, check each day when the company is open for business and when agents are available to handle Web callback requests.
3. For each day you check, specify the time (hours and minutes) the company opens on that day from the Opening Hours From drop-down list, or select 24 Hours if the contact center is always available for handling chat and Web callback interactions.
4. Identify the time (hours and minutes) the company closes on each day from the To drop-down list, and click OK.

CAUTION: Before agents and supervisors can log in to the company, your network administrator must add the required servers and resources for the company to the machine hosting your CCA installation.

Providing Custom Web Applications Access to Company Database Tables

CCA uses a Web Services API that allows coding for unique Web Client applications. Use the Remote Database Configuration tab to give your custom Web applications access to selected tables in the CCA database for synchronization.

To provide custom Web applications access to company database tables

1. You must log in as a network administrator for the Remote Database Configuration tab to be available.
2. Select Options, Company, and then the Remote Database Configuration tab.
3. Select the Enable Remote DB check box. Additional fields appear.
4. Use the information in the following table to complete the Remote Database Configuration fields, and click OK:

Field	Description
Enable Remote DB	Select this check box to enable a remote database. Additional fields appear after you make this selection.
URL	(Required) The URL of the CCA Web Server.
Username	Type a user name and password to create a special account, used solely for giving a client application limited access to the CCA database. **NOTE:** This user cannot log in to any CCA application and does not appear in any reports.
Password	Type the password for the client application to use to access the CCA database.
Client History	Select to allow synchronization of the Client History Table.
Quality Control	Select to allow synchronization of the Quality Control Table.
Users	Select to allow synchronization of the Users Table.
Projects	Select to allow synchronization of the Projects Table.
Workgroups	Select to allow synchronization of the Workgroups Table.
Interactions History	Select to allow synchronization of the Interactions Table.

Enabling SIP Billing

Contact centers use SIP billing to do the following:

- Make outbound SIP calls.

- Use a billing module that connects to the SIP software proxy. The billing module examines the Diversion field of the SIP header to determine how to bill the call.

To enable SIP billing

1. Select Options, Company, and then the SIP Billing tab.
2. Do one of the following:
   - If your billing module expects to find a string in the SIP header for Outbound SIP calls, enter that string value in the Outbound Call field.
   - If your billing module expects to find a string in the SIP header for calls that are routed to an agent, enter that string value in the User Call field.
3. To exclude the cost of OnNet Calls (calls made from the ASP to the tenant company) from the company, select the User ANI Billing check box, and then enter a specific ANI. The system looks for this ANI on all agent call legs for all company agents. So, when a direct or internal call associated with this ANI occurs, and the agent is logged in to the system, the cost of the call will not be included in SIP billing. If, however, the agent is not logged in to the system and the call is answered anyway, the cost will be included in SIP billing.

   CAUTION: Only a network administrator can define OnNet calls.

   NOTE: ACD calls, however, will not ring through unless the agent is logged in to the system.
4. Click OK.

Integrating CRM With the Internet or a Win32 Application

For your company to invoking a Web page or Win32 application, CCA must pass several parameters containing information about the interaction to the Web page or Win 32 application. (A Win32 application is an executable (.exe) application written for 32-bit Windows operating systems.) You must create a Custom tab in the Interaction Manager (IM) where CCA will load the Web page or identify the external application that CCA will launch on the agent’s machine.

TIP: See Appendix D, “Parameters Passed to External Applications,” for more details about these parameters.

To integrate CRM with the Internet or a Win32 executable application

1. Select Options, Company, CRM Integration. The CRM Integration tab has two subtabs:
   - The Custom tab for creating a custom tab in Interaction Manager (IM), and then loading a unique Web page into that Custom tab.
   - The External Application tab for launching a separate browser on the agent’s machine. When the browser is launched, it loads a unique Web page and then launches a Win32 application on the agent’s machine.

2 To have your custom tab appear in the agent's Interaction Manager screen, select the Custom tab, and then select Enable custom tab in Interaction Manager check box. Additional options become available.

3 Use the information in the following table to complete the fields and make selections:

Field	Description
Enable Custom tab in Interaction Manager	Select this check box so that your custom tab will appear in IM. The bottom of your custom tab will have a frame and the Web page that you enter in this field will appear in that frame. **NOTE:** You can also enable IM to spawn a browser process to load an HTML page, and choose whether the browser process is modal or non-modal.
Enter Text Label	Type the name of your custom tab as you want it to appear in IM.
Include HTML File	Enter a URL with a protocol, server, and a filename. For example: `https://a_server/a_path` or `https://a_server/a_path/a_file.html` **NOTE:** CCA supports any protocol that the browser supports (`http`, `https`, FTP, and so on). **NOTE:** If the URL string does not contain a protocol, IM automatically adds `http://` as a default prefix upon receiving the URL. In addition, because IM adds a default prefix, it does not appear in AM.
Run Application	These radio buttons let you choose when your HTML file will load into the custom tab in IM: ■ **Every time a new interaction is received.** When IM offers an interaction to an agent, IM loads the HTML file into the custom tab. ■ **When a new interaction is accepted.** When the agent clicks the Accept Interaction button in IM, IM loads the HTML file into the custom tab. Furthermore, IM does not reload the HTML page if the agent puts the interaction on Hold (or some other action), and then moves the interaction back into the Active Area. ■ **Every time an interaction is accepted.** When the agent clicks the Accept Interaction button in IM, IM loads the HTML file into the custom tab. Furthermore, IM reloads the HTML page if the agent puts the interaction on Hold (or some other action), and moves the interaction back into the Active Area. ■ **After each interaction is complete.** When the interaction is disconnected, IM loads the HTML file into the custom tab. Furthermore, when IM loads the HTML, it passes all the data known about the interaction (such as the interaction type, contact information, and so forth) as parameters in the URL string.

4 To allow agents to open an external application or another Web page from the Interaction Manager screen, select the External Application sub tab.

5 Select the Enable external application to invoke from the Interaction Manager check box. Additional options become available.

NOTE: The external application you want agents to use must already be installed on the agent's machine.

6 Use the information in the following table to complete the fields and make selections:

Field	Description
Enable external application to invoke from Interaction Manager Application to invoke	**NOTE:** If you are loading an executable the executable must already be installed on the agent's machine. Type the full path (including the executable name) or type only the executable name (if the location is already in the agent's PATH variable). If you are loading an HTML page: Type the full path to the page. ■ Configure a custom tab in IM to load an HTML page in one two ways:Use the Company, CRM Integration, Custom Tab so that IM loads the HTML page into a frame at the bottom of the custom tab. ■ Use the Company, CRM Integration, External Application Tab so that IM will display a browser process and load the HTML page. You can also choose whether the browser process is modal or nonmodal. (See the next field, Application Type.)

Field	Description
Application Type	From this menu, select one or of the following options: ■ **HTML Modal.** Select this setting if you entered the path of an HTML file in the Application to Invoke field, and you want to force the agent to close the browser. In this case: IM loads the HTML page by displaying an external browser. The browser window stays in the foreground and the agent cannot use IM until after closing the browser window. ■ **HTML Window.** Select this setting if you entered the path of an HTML file in the Application to Invoke field, and you want the agent to be able to keep the window in the background. In this case: IM loads the HTML page by displaying an external browser. The agent can use a mouse (or Alt-tab) to go back to IM, placing the browser window in the background. ■ **Win32 Window.** Select this setting if you entered the path of an executable file in the Application to Invoke field, and you want IM to launch the executable file.
Run Application	The following options let you choose when IM loads the HTML file or executable into the custom tab: ■ **Every time a new interaction is received**. When IM offers an interaction to an agent, IM loads the HTML file or executable into the custom tab. ■ **When a new interaction is accepted**. When the agent clicks the Accept interaction button in IM, IM loads the HTML file or executable into the custom tab. Furthermore, IM will not reload the HTML page if the agent puts the interaction on Hold (or some other action), and then moves the interaction back into the Active Area. ■ **Every time an interaction is accepted**. When the agent clicks the Accept interaction button in IM, IM loads the HTML file or executable into the custom tab. Furthermore, IM reloads the HTML page if the agent puts the interaction on Hold (or some other action), and then moves the interaction back into the Active Area. ■ **After each interaction is complete**. When the interaction is disconnected, IM loads the HTML file or executable into the custom tab. Furthermore, when IM loads the HTML page or executable, it passes all data about the interaction (such as, the interaction type, contact information, and so on) as parameters in the URL string.

Enabling or Disabling Applet Console Configuration Settings (Troubleshooting)

The Applet Console Configuration tab contains settings mainly for advanced troubleshooting.

NOTE: This tab is available only to network administrators.

To enable or disable Applet Console Configuration Settings for troubleshooting

1. Click Options, Company, and then the Applet Console Configuration tab.
2. Use the information in the following table to complete the fields:

Field	Description
Close Connection	CCA applications (AM, IM, SM, and so on) occasionally connect to the CCA Web Server to determine if there are any messages (interactions, statistics updates, and so on). This option has the following effects: ■ If the Close Connection box is not checked, the applications will continue to use the same HTTP connection to the Web Server indefinitely. ■ If this box is checked, the connection will reestablish every 60 requests
Disable Agents Cache	When a user logs in to IM or SM, CCA downloads information (about status, workgroups, users, URLs, outcomes, and so on) from the database so that it appears in the application. While the user is logged in, this information is in memory. However, when the user logs out, the application writes all the data to the temporary files on the user's hard drive. CCA saves the temporary files, so that the next time the user logs in, the application only needs to download new or changed information (like a new project or outcome, or a deleted or edited item) rather than downloading all the data. When you select this check box, CCA downloads all information needed by the application (from the database) each time the user logs in. **CAUTION:** This data can consume a large amount of resources on both the server and the user's machine.

Field	Description
Debug Level	From the drop-down, select the level of debug information to generate. You can view the debug information from a file, Telnet window, or the Java Console. Select from the following: ■ **Off.** Does not generate any debug information. ■ **Debug.** Generates most debugging information about the system. ■ **Info.** Generates minimal debug information. ■ **Error.** Generates only error information. ■ **Fatal.** Generates only information about fatal errors. ■ **All.** Generates all debug and error information. **NOTE:** If you choose to send the information to the Java Console or Telnet, the All option will consume most of your memory and CPU.
Enable Telnet	Select to allow viewing the debug information in a Telnet window. **TIP:** See "Process of Enabling Telnet" on page 82.
Time to Login (in minutes)	From the drop-down list, select the time that IM will wait before downloading all needed information from the database and logging in to the IM Server. So, if the login takes more than this time, IM automatically logs out.
Enable Log File	Select this check box to write debug information to a file. You must also enter a log file path and the path must include the filename. **NOTE:** The system creates folders if they do not exist. The system writes a debug file to this path on every agent's machine.
Ping Delay in Seconds	CCA applications (AM, IM, SM, and so on) occasionally connect to the CCA Web Server to determine if there are any messages (interactions, statistics updates, and so on). The Ping Delay in Seconds is the time that the applications waits before sending the next request to the Web Server.
Disable Wrap Up Timer	If checked, the wrap-up timer does not appear to agents in IM. (This option prevents flicker on some screens.)
Disable Elapsed Timer	If checked, the interaction timer does not appear to the agent in IM. (This option prevents flicker on some screens.)
Disable Phone State Timer	This is the animated phone icon that appears in the IM Information Bar. If checked, the agent will not see the animated icon. The agent will always see the on-hook icon. (This can prevent flicker on some screens.)

Field	Description
URL Timeout (in Seconds)	From the drop-down list, select the time that the application (AM, IM, and so on) will wait for a response from the Web Server before ending the connection and resending the request.
Enable Hot Keys	Select this check box to enable CCA's keyboard shortcuts. If unchecked, CCA's keyboard shortcuts will not work and will not conflict with any third-party application keyboard shortcuts.

3 After changing the setting for any of the check boxes, click OK. A message box appears with two options.

4 Select one of the options, and click OK:

- Do not apply the new policy to every agent.

  This option changes the company default setting, which means that only agents who use the company default setting are affected.

  TIP: See "Allow Outbound Calls" on page 188, Use Company's Default Setting option.

- Apply the new policy to every agent.

  This option changes the company default setting and the setting for all agents. For example, if the agent setting is *Always* and you change the company setting to *Disable*, and select *Apply the new policy to every agent*, then the agent setting changes to *Disable*.

  TIP: See "Allow Outbound Calls" on page 188, Disable option.

Adding or Removing Company Configuration Features

The Company Configuration tab allows you to add or remove several features to IM and SM. These features include allowing outbound calls, enabling the Stop All Recording functionality of IM, establishing a range of telephone extensions for the company, automatically setting agent extensions, and selecting a company package of defined features.

CAUTION: You must log in as a network administrator for this option to become visible.

To add or remove company configuration features

1 Select Options, Company, and then the Company Configuration tab.

2 Use the information in the following table to complete these fields:

Field	Description
Allow Outbound Calls	■ From the drop-down list, select one of the following outbound call options: **Always.** The agent can always make outbound calls (including external calls, PBX, IP Call, Connect To Server, phone links in the Contact tab, Auto Redial, and so on). ■ **Enable with Interaction.** If the agent has an active interaction of any type, then the agent can make outbound calls for the duration of the interaction. ■ **Disable.** The agent can never make any type of outbound call. **NOTE:** As soon as you apply a change, CCA dynamically updates both SM and IM immediately.
Enable Stop All Recording Functionality of Interaction Manager	Select this option to stop any agents using the Interaction Manager (IM) from recording any interactions.
Range of Extensions for Company Start End	In the Start box, type the starting number for company phone extensions. In the End box, type the ending number for company phone extensions. **NOTE:** Extension numbers cannot begin with zero, must contain a minimum of three numbers, and have a maximum of five numbers.
Auto Set Agent Extension	Select this option so that CCA automatically assigns an extension to each agent.
Package	From the drop-down list, select the company package, which identifies each contact center feature set for this company. **TIP:** For more about company packages, see “About Company Packages” on page 48.

3 Click OK. If you made changes, a message box appears with two options.

4 Click to select one of the two options:

- Do not apply the new policy to every agent:

  This option changes the company default setting. Only agents who use the company default setting are affected.

  TIP: See “Allow Outbound Calls” on page 188, Use Company’s Default Setting option.

- Apply the new policy to every agent:

  This option changes the company default setting and the setting for all agents.

  TIP: See “Allow Outbound Calls” on page 188, Disable option.

For example, if the agent setting is *Always*, and you change the Company setting to *Disable*, and then select *Apply the new policy to every Agent*, then the agent setting changes to *Disable*.

Changing the Login Policy

Use the Login Policy tab to enforce some password control over anyone who logs in to AM, IM, and SM, or to authenticate CCA users on an already configured LDAP server.

You can also restore a user’s access after a permanent lock out. See “To restore a user’s access after a permanent lock out” on page 78.

To change the Login Policy

1 Click Options, Company, and then the Login Policy tab.

2 Use the information in the following table to complete the selections, and click OK:

Field	Description
Select Login Policy	From the drop-down list, select a login policy from: ■ Select the TAW Default Login option to enforce some password control over anyone who logs in to AM, IM, and SM. (For example, the password required length, required characters, lockout policy, and so on.) ■ Select the LDAP Authentication option to authenticate CCA users on an already configured LDAP Server. When you select this option, different fields appear. **TIP:** See "Completing the LDAP Authentication Policy" on page 78.
Password must include at least the following	Specify all of the following: ■ **Alphabetic characters**. Check so that the user's password must contain at least one character in the set A - Z (uppercase or lowercase). ■ **Numeric characters**. Check so that the user's password must contain at least one character in the set 0 - 9. ■ **Special characters**. Check so that the user's password must contain at least one special character. A special character is any character that is not numeric or alphabetic (such as "!@#$%) and includes math symbols, punctuation, braces, parentheses, slashes, and so on. ■ **Uppercase characters**. Check so that the user's password must contain at least one uppercase character in the set A - Z. ■ **Lowercase characters**. Check so that the user's password must contain at least one lowercase character in the set a - z.
Password Minimum Length	From the drop-down list, select a minimum password length forcing users to create a password with at least this many letters.
Number of login attempts before locking the account	From the drop-down list, select the number of attempts to give a user (to enter a correct user name and password) before locking the account, so that the user can no longer log in. **NOTE:** How the system unlocks the user's account depends on which locking option you select in the next check boxes.
Lock User Account for [ ] Minutes	Check this option and, from the drop-down list, select the maximum time the user must wait before being able to log in to the account again, as usual.
Lock User Account Permanently	Check this option so that when the number of login attempts is reached, the user will not be able to log in to the system until you unlock the account.

Field	Description
Never Lock the User Account	Check this option so there will be no limit on the number of incorrect user name and password combinations that a user can enter.
Deactivate user account if inactive for [] Days	Check this option so that the system deactivates a user's account if it remains inactive for the number of days you enter.

To restore a user's access after a permanent lock out

1. Change the lockout policy to, Never Lock the User Account, and click OK.
2. Ask the user to log in again. (The user can access the system as usual.)
3. Change the lockout policy back to your preferred setting.

Completing the LDAP Authentication Policy

While in the Login Policy tab, if you are using an LDAP (Lightweight Directory Access Protocol) Server, select the LDAP Authentication policy check box to identify the characteristics CCA will use to allow LDAP authentication. These characteristics include:

- The host name of the network machine running the LDAP Server.
- The LDAP server port number.
- The location where users exist on the LDAP server.
- The user's DN (distinguished name)
- The user's password

NOTE: After identifying the LDAP authentication characteristics, and before logging out of CCA, you must select the Test LDAP Connect button to verify that the connection works.

To complete the LDAP authentication policy

1. In the Login Policy tab, select the LDAP Authentication policy. Different fields appear on the screen.

2 Use the information in the following table to complete these fields:

Field	Description
LDAP Server Hostname	Type the host name of the network machine that is running an LDAP server.

LDAP DN	Type the distinguished name of the LDAP server. Examples of the field syntax are as follows:
	`ou=Admin,ou=Global Preferences,ou=telephonyatwork.com,o=NetscapeRoot`
	`DC=telephonyatwork,DC=com`

LDAP Port Number	Type the port the LDAP server uses.
LDAP Search Attribute	Type the field identifying where users exist on the LDAP server.
TAW LDAP Search User	■ **User's DN**: Type the distinguished name of the user you created on the LDAP server to allow CCA applications to be LDAP authenticated. ■ **Password**: Type the password of the user you created on the LDAP server to allow CCA applications to be LDAP authenticated.
Test LDAP Connection (button)	Click this button so that AM tests the connection to your LDAP server using the information you have provided. (If the test fails, go to "What to Do If the Test LDAP Connection Fails.") **NOTE:** When using LDAP Authentication, before logging out, you must click this Test LDAP Connection button.

What to Do If the Test LDAP Connection Fails

If the test LDAP connection fails, do one of the following:

- Change the LDAP information that you entered so that a successful test connection is made,
- Return to using the Default Login Policy until you determine what is causing a problem with the LDAP information.

NOTE: If you log out of AM after the test fails, CCA forces you to manually edit the CCA database before you can log in to AM again.

Adding Agents When Using LDAP Authentication

See "Password" on page 67 for information on how to add agents when you use LDAP authentication.

Controlling Company Licensing

From the Options, Company selection, use the Licensing tab to control:

- The maximum number of allowable simultaneous interactions for a company.
- The maximum number of simultaneous users a company can have logged in.
- The maximum number of channels that the predictive campaigns are allowed.

To control company licensing

1. Log in as a network administrator to edit fields or as a system administrator to only view the fields.
2. Click Options, Company, and then the Licensing tab.
3. Use the information in the following table to complete these fields, and click OK:

Field	Description
Maximum Number of Simultaneous Interactions Permitted for this Company	For each company that you provide a service, type the maximum number of interactions the company can have at the same time.
Apply for Voice Interactions Only	Leave this box unchecked to tell CCA to count all interactions when calculating the total for the previous field. For example, if the previous field value is 400, then CCA allows the company a total of 400 interactions of any kind at the same time. Select this check box to give the company unlimited noncall interactions while still setting a limit on the call interactions. The company can have as many fax, voicemail, email, and chat interactions as they want at the same time, but can have only a limited number of call interactions at the same time (ACD call, inbound/outbound extension, direct inbound/outbound).
Interaction Limitations (Online, Offline, and Chat)	You can limit or reserve the license slots for online, offline, and chat interactions. The limitations are by company and defined by network administrator permission. These thresholds, with the Peak Interactions Report, allow you to better track and allocate your system licenses. Type the maximum number of interactions the company can have at the same time for online (voice calls, ACD callback, and Web callback), offline (email, ACD fax, and voicemail), and chat.
Maximum Number of Logged In Users	Type the maximum number of agents the company can have logged in to the system at the same time. **NOTE:** CCA does not include supervisors and administrators in this count.

Field	Description
Maximum Number of Logged In Supervisors	Type the maximum number of supervisors the company can have logged in to the system at the same time. **NOTE:** CCA does not include the agents or administrators in this count.
Maximum Number of Channels Allowed to be Used by a Predictive Campaign	Type the maximum number of channels a Predictive Campaign can use. **NOTE:** This option limits the impact predictive dialing has on channel use.

Storing Voicemails (Unified Messaging)

For fast access to voicemails and for more flexible functions, you can choose to store voicemail messages as wave files on your local drive. You use an FTP Server to store the fields and the database to store the information and status of the voicemail.

To store voicemail messages as wave files on your local drive

1. Log in as a network administrator to edit fields, or as a system administrator to only view the fields.
2. Click Options, Company, and then the Unified Messaging tab.
3. Select how to store voicemails as the default option for the entire company from one of the following:
   - Click Mail Server to store voicemails on the Network Email Server.
   - Click Internal Voicemail to store voicemails locally.
4. Click OK.

   NOTE: You can also identify how to store voicemails at the agent level. See Step 23 on page 196 (the Unified Messaging tab).

Process of Finding a Company

If you provide contact center services for several companies, use the AM Company List search tool to quickly locate a company definition from a large list.

Do one of the following:

- In the character bar above the company list (A B C D, and so on), click the first character or number of the company name.

  A list of all companies beginning with the character or number you selected appears.

- In the Find a Company text box, enter as much of the company's name as you can and then click Go.

  A list of all companies beginning with the text you entered appears.

  NOTE: Click the Remove Filter button to display the entire list again.

Process of Sorting Columns of Information

You can sort columns as follows:

- To sort a list based on column contents, click a column header.
- To restore the list so that it displays all companies, click Remove Filter.
- To traverse the list, click the controls at the bottom of the company list.
- To limit the number of companies in the list, from the numeric drop-down list, select the maximum number of company definitions to display.

Use the information in Table 26 for additional ways to manipulate the results:

Table 26. Company List Results

Click...	To Display...
<<First	The beginning of the company list
<Previous	The previous group of company definitions (based on the maximum number to display)
Next>	The next group of company definitions (based on the maximum number to display)
Last>>	The end of the company list

Process of Enabling Telnet

You can enable Telnet to view debug information as long as the Enable Telnet option is enabled.

TIP: See "Enabling or Disabling Applet Console Configuration Settings (Troubleshooting)" on page 72.

Start a Telnet session by typing the following in the DOS command line:

"telnet <*hostname*> <*port*>" where:

<*hostname*> = the name of the machine where the client application is running. (For example, the name of the machine where AM is running.)

<*port*> = 48000 for IM, 48001 for SM, and 48002 for AM.

6 Creating CCA Libraries

This chapter explains how to create libraries of resources, settings, or information for use by other parts of the Contact Center Anywhere (CCA) application. This chapter includes the following topics:

About CCA Libraries

Libraries represent resources within your company or departments. An example resource is a POP3 server. Libraries can also consist of settings (such as prefix routing patterns) or information (such as custom statuses or faxes). Other parts of the application use the libraries that you create in the same way that they use information about your agents, workgroups, and projects.

Process of Creating and Deleting Libraries

In most cases, creating and deleting libraries is easy. However, you might need information from other people in your company, such as agent supervisors or an IT staff member. For example, when setting up an agent for email using Administration Manager (AM), you must select a POP3 server and an SMTP group for that agent. So, before you can set up an agent's email, you must first create at least one record (or object) in:

- AM, Libraries, POP3 Servers
- AM, Libraries, SMTP Servers
- AM, Libraries, SMTP Groups

NOTE: Depending upon your configuration, select a company before creating the libraries. Click the Back to List of Companies link, and then double-clicking a company name.

Before creating CCA Libraries, make sure to answer the questions in the *Administrator's Planning Survey*. For more information on the planning survey, see Chapter 3, "Planning a Contact Center."

Before deleting CCA Libraries, make sure they are not in use. Check whether CCA is using a library by following the task instructions for deleting the specific library.

Creating an Agent Skills Library

Agent skills are the abilities that agents possess allowing them to handle interactions coming into the contact center. CCA matches the needs of the caller with the skills of available agents, and routes the interaction to the agent most qualified to handle the interaction.

For example, if your contact center handles callers who speak French and Spanish in addition to English, you might create two agent skills (*Speaks French* and *Speaks Spanish*) to supplement the ability to speak English, which all your agents possess. Thus, when a Spanish-speaking caller reaches the contact center, CCA routes the caller to the available agent with the highest score for the *Speaks Spanish* skill. Agent Skills is located under Options, and not Libraries.

To create an Agent Library

1. Click Options and then Skills. The Skills List screen appears.

   Idle Time always displays as the default in the Skills List. *Idle Time* is a system-defined skill, which you cannot delete or edit.

2. Click Add. The Add Skills screen opens.
3. In the Skill Name text box, type the name of the first skill.

   TIP: See your answer to "Question 11: What Skills Will Your Agents Possess for Call Routing?" on page 31.

4. In the Description text box, describe the abilities an agent with this skill must possess, and click OK. The Skills screen reappears, showing the new skill name and description.

5 Repeat steps 1 through 4 to create all the skills specified on the *Administrator's Planning Survey*.

6 Assign skills to individual agents when you create their profiles.

TIP: See Chapter 9, "Creating Administrator, Agent, and Supervisor Accounts" for information on how to assign these skills to individual agents.

Deleting an Agent Skills Library

Deleting departed or unused skills frees space in the CCA database. It also ensures that an invalid skill will not appear in AM screens.

Before deleting a skill, make sure CCA is not using the skill by selecting the following areas:

- Remove the skill assignment from all workgroups.

  TIP: See "About Assigning Skills to a Workgroup" on page 204.

- Remove the skill assignment from all agents.

  TIP: See Step 9 on page 192.

To delete an Agent Skills Library

1 Click Options and then Skills. The Skill main screen opens.

2 Select the Skill you created, and then click Delete. (You can also right-click a skill and select Delete).

  A confirmation message appears.

3 Click OK to confirm the deletion.

Creating an Agent Statuses Library

CCA tracks the status of every agent presently logged in to the system. Supervisors use these status indicators to monitor agent activity. The agents depend on the Interaction Manager (IM) status indicator to control their availability.

CCA provides predefined system statuses. You can add additional statuses that are specific for your contact center, see Table 27. For example, you can add *Ten Minute Break* or *Out to Lunch* as statuses for your contact center.

Table 27 lists the predefined system statuses, the condition that triggers the status, and whether agents can receive new interactions while they are set to the status.

Table 27. System Statuses, Meanings, and Conditions

Status	Meaning	Condition
ACD Call	Busy	Agent is handling a call.
ACD Callback	Busy	Agent is handling a callback request.
ACD Chat	Busy	Agent is handling a chat interaction.
ACD Email	Busy	Agent is handling an email interaction.
ACD Fax	Busy	Agent is handling a fax interaction.
ACD Status Outbound Email	Busy	Agent used IM (Contact tab) to initiate an outbound email.
ACD Voicemail	Busy	Agent is responding to a voicemail interaction.
ACD Web Callback	Busy	Agent is handling a Web callback request.
Available	Available	Agent is not presently handling an interaction. **NOTE:** Agents can manually select this status, or they can receive this status after completing an interaction (configurable by an administrator).
Busy	Busy	Agent is not available to receive any other ACD interactions.
Direct Chat	Busy	A supervisor and an agent are chatting.
Last Call	Busy	Set by the agent to tell CCA not to send any more interactions after completing the current interaction.
Login	Available	Reserved for future use.
Logout	On Break	Agent logged out of IM. This option appears in the Company Directory.
New Inbound Call	Busy	Agent accepted a call made directly to the number from a number outside the contact center.
New Inbound Extension	Busy	Agent has accepted a call made directly to the number from an internal extension.
New Outbound Call	Busy	Agent directly dialed a number outside the contact center.
New Outbound Extension	Busy	Agent directly dialed a company extension.
New Predictive Call	Busy	Agent accepted a predictive call.
New Preview Call	Busy	Agent accepted a preview call.
No Answer	On break	Agent did not answer a workgroup call after the maximum allowed number of rings.

Table 27. System Statuses, Meanings, and Conditions

Status	Meaning	Condition
On Break	On break	Set by the agent to tell CCA not to send any more interactions.
Selecting Outcome	Busy	Agent disconnected from the last interaction, but is still selecting an outcome for that interaction.
Supervising	Busy	A user logged in to Supervision Manager (SM) and is not available to receive ACD interactions.
Wrap Up	Busy	Agent is wrapping-up an interaction. **NOTE:** CCA changes the agent status to Available automatically upon expiration of the wrap-up time. **NOTE:** Wrap-up does not apply to Outbound Calls.

To create an Agent Statuses Library

1. In the navigation pane of AM, click Libraries, Agent Statuses, and then Add. The Add Agent Status screen opens.
2. Locate the row for the language that the new status supports.
3. In the Status Name column, enter the name of the first agent status from question 12 of the *Administrator's Planning Survey*.
4. In the Description column, describe the activity an agent must engage to receive the status.
5. Repeat steps 3 and 4 for all the languages that the status supports.

6 Use the information in the following table to choose a meaning for this status, and click OK:

Meaning	Description
Busy	Assign this meaning to a status to indicate that the agent is busy handling a task. CAA performs the following actions, based on your choice: ■ If the task the agent is handling is an online interaction (call, callback, or Web callback), then CCA routes the incoming interactions to another agent. ■ If the agent is handling an offline interaction (fax, email, or voicemail), CCA continues to route the incoming interactions to the agent until the maximum number of offline interactions allowed for the agent is reached **TIP:** See the *Contact Center Anywhere Supervision Manager Guide*. ■ If the agent is handling a chat interaction, CCA continues to route the incoming chat interactions to the agent until the maximum number of chat interactions allowed for the agent is reached. **TIP:** See the *Contact Center Anywhere Supervision Manager Guide*.
Available	Assign this meaning to a status to indicate that the agent is available to handle interactions. While the agent is set to a status with this meaning, CCA considers this agent when routing interactions. **CAUTION:** Setting the *No Answer* status to a meaning of *Available* can result in misrouting of interactions if an agent forgets to log out of IM before leaving the workstation.
On Break	The agent is logged in to CCA, but is currently unavailable to receive interactions.

7 Repeat steps 1 through 6 until you have entered all the statuses you specified in the *Administrator's Planning Survey*.

TIP: See Chapter 3, "Planning a Contact Center."

NOTE: Clicking Restore Default restores the system statuses to the default name and meaning.

When an agent clicks the Change Status button in IM, CCA displays a status drop-down list. The agent can choose a status from this list.

Statuses from the Agent Status Library display in the My Status area of IM, while the meaning (Busy, Available, or On Break) for the status displays in the Current Status area of IM.

Creating an Agent Departure Reasons Library

The Agent Departure Reasons Library enables you to store and track the reasons why agents leave your contact center.

To create an Agent Departure Reasons Library

1. Click Libraries and then Agent Departure Reasons. The list of agent departure reasons appears.
2. Click Add. The Add Departure Reason screen opens.
3. In the Departure Reason box, type a title or short description for the reason why an agent left the company.
4. In the Description box, type a longer description of the departure reason.

Deleting an Agent Departure Reason

You can easily delete specific departure reasons from the Agent Departure Reason Library.

To delete an Agent Departure Reason

1. Click Libraries and then Agent Departure Reasons. The list of agent departure reasons appears.
2. Locate the reason to delete, and click Delete. A confirmation message appears.
3. Click OK. The list refreshes and the reason you deleted no longer appears.

Creating an ANI Library

CCA can provide an outbound ANI (automatic number identification) for the contact center. Then, you can define the ANI Library to contain all of the ANI numbers and the descriptions for each tenant (company).

NOTE: The quantity of ANI numbers is not limited.

The following are some potential use cases:

- **For Outbound Calls.** CCA provides ANI for the outbound calls from a list of Pilot Numbers allocated for the tenant.
- **For Outbound Campaigns.** You cannot provide ANI for outbound calls. The display name shows *anonymous* for these calls.

When deploying the ANI numbers into the project, a drop-down list displays the ANI numbers defined in the ANI Library. The drop-down box contains only phone numbers, the description is referenced in the library. See Table 28 for ANI fields and descriptions.

Table 28. ANI Fields and Descriptions

Field	Description
ANI	Number string of ANI
Description	Description of the project to which ANI applies

To create an ANI Library

1. Click Admin, Libraries, ANI Library, and then Add. The ANI Library screen opens.
2. Enter an ANI Number and a description of the project, and click OK.

Process of Creating a Business Events Library

You create business events to identify issues or occurrences that are directly related to your company. For example, you can create a business event to identify your company's normal operating hours. You can create another business event to identify your company's after hours and another for weekend hours. You can also create a business events to identify holidays when your business is closed. Use business events to route a call in a campaign based on the day or time when the customer called.

A *business event* is a group of one or more subevents. For example, in the same business event, you can define:

- Weekday business hours
- Saturday business hours
- All holiday business hours for the current year

Follow these guidelines when creating business events:

1. Decide how to define business events while developing your campaigns.
2. Add the entire event when you add a business event to a campaign.

In this way, your campaign will handle all occurrences in that business event in the same way.

Creating Business Events to Route Calls

If you have a campaign, use a business event to route a call based on the day, date, and time that the call reached your company. For example, if a call reaches your company during normal business hours, your campaign can handle the call one way. Whereas, if the call reaches your company after business hours, your campaign can handle the call in a different way.

To create business events to route calls

1. From the AM Navigation area, select Libraries, Business Events, and then click Add. The Add Business Event screen opens.
2. Type a name for the event (such as *Weekday Business Hours* or *Weekday After Hours*), and then click Plus. The Define Sub Event dialog box opens.
3. In the Define Sub-event dialog box:
   a. Type a name in the Sub Event Name box.

b. Under Schedule Event, click Specific Period (to add a one-time event) or Weekly (to add weekly events). The dialog box provides different selections, depending on your choice.

4. When creating a one-time event, select the From and To dates from the calendar, and select the hours and minutes from the drop-down lists.

   For example, if your company is closed on Memorial Day in 2007, select 05/30/07 in both the From and To dates. Then, select times from the drop-down lists.

5. When creating a weekly event (an event occurring one or more times for each week at the same time), select each day, and then select the From and To times for each day from the respective drop-down lists, and click OK.

NOTE: You can continue to add more subevents from the Business Events main screen.

Editing Business Events

After you create a business event, you can easily change its characteristics.

To edit a business event

1. Select the event and click the pencil icon. The Define Sub Event dialog box appears.
2. Complete the steps in "Creating Business Events to Route Calls" on page 90, beginning with step 2.

Deleting Business Events

You can easily delete a business event.

To delete a business event

- Select the event, click Delete, and click OK.

For more information on how to add business events to campaigns, see "About Using Menu Routing Conditions" on page 285.

Creating a Company Prompt Library

CCA uses sound recordings as prompts. CCA can play different recordings to greet and inform callers dialing into your contact center. You can select from a set of default system prompts or create custom company prompts. Table 29 shows examples of the different ways that CCA can use recordings from the Prompt Library.

Table 29. Example Prompts

Prompt Purpose	CCA Feature	System Default Prompt
Describes a touch-tone menu (you created) that lets the caller navigate the contact center.	You can create touch-tone menus for your callers to use when navigating your contact center.	None
Request the caller's ID number.	You can configure CCA to ask callers to enter an ID number or other personal information, so you can prioritize them.	*Please enter your customer ID number followed by the pound key.*
Describes a menu of options available to a caller after leaving a voicemail message.	You can create touch-tone menus for callers to hear after leaving a voicemail message.	None
Greet callers entering a workgroup queue to wait for an agent.	You can add a recording to greet callers as they wait for a workgroup agent.	*All agents are currently busy with other callers. Please continue to hold to maintain your priority sequence. This call may be monitored for quality assurance purposes.*
Play an informational message for callers waiting to be connected to a workgroup agent.	You can add a recording for providing information to a caller while waiting for a workgroup agent.	*Your call is very important to us. Please hold for the next available agent. All calls are answered in the order in which they are received.*
Inform the caller that an agent is available and they are about to be connected.	You can add a recording letting the caller know that an agent is available.	Thirty-five seconds of ringing (7 rings).
Entertain callers who are waiting to be connected to a workgroup agent.	You can add music to entertain callers while they are waiting for a workgroup agent.	Fifty-six seconds of prerecorded music.
Leave a message on a prospective customer's answering machine (reached when making a predictive call).	You can leave a message on an answering machine of a caller CCA reached using a predictive call.	None

NOTE: The recording must be in a .wav format. You must record and save your prompt recordings before adding them to the Prompt Library.

TIP: See “Recording the Prompt” on page 155 for information on how to record, save, and use customized and supplied default prompts in CCA.

To create company prompts

1. In the navigation pane of AM, click Libraries, Company Prompts, and then Add. The Company Prompts screen opens.
2. Type a name for the prompt in the Prompt Name text box. The name you enter appears in the prompt list when you set AM to the language supported by this prompt.
3. Click the language in which you recorded your prompt.
4. In the Description text box, type a description of the prompt. This description appears in the prompt list when you set AM to the language supported by this prompt.
5. Type the filename and path to the prompt (or click Browse to choose the file from your computer or network).
6. Click the speaker icon to listen to the recording to verify that it is correct (or click Delete) to cancel a prompt recording that you previously uploaded).
7. Repeat steps 4 through 6 for each language for which you recorded a prompt, and click OK.

CCA stores the new prompt in the CCA database and plays it for your callers (or agents), as necessary.

Creating a Data Source Library

A *data source* is a record that identifies your contact record structure and where data is stored. CCA ships with a fairly large database, containing many tables. For example, one of these tables, the Contacts Table, is highly customizable. The Contacts Table is where CCA stores Contact Records created by agents and supervisors.

The Contacts Table ships preconfigured and ready to use. You can use it immediately without any changes. However, if you have a separate database with a large volume of contact data, and you do not want to add this to the default Contacts Table in the CCA database, then you must customize this table or replace it with a table of your own.

In CCA, the Data Source feature works together with the Display Templates feature:

- Use the Data Source feature to customize the contact data you store and identify where to store it.
- Use the Display Templates feature to customize how your contact data appears to agents and supervisors.

CAUTION: Creating data sources is an advanced topic. It might require knowledge of the contact center server architecture and planning and administrator-level access to the default CCA database. You might also need other back-end databases, used by a contact center, and administrator rights on one or more contact center servers.

To create a Data Source Library

- Follow the steps described in "Process of Creating a Display Templates Library" on page 96.

Deleting a Data Source Library

Deleting departed or unused data source creates free space in the CCA database. It also ensures that an invalid Data Source does not appear in the AM screen.

Before deleting a data source, make sure CCA is not using the Data Source by checking whether the source was removed from all display templates.

TIP: See "Process of Creating a Display Templates Library" on page 96.

To delete a data source library

1 Click Libraries and then Data Source.

The Data Source main screen opens.

2 Select the Data Source you created, and then click Delete.

A confirmation message appears.

3 Click OK to confirm the deletion.

Creating a Database Connections Library

You must create a Database Connections Library before you can run SQL queries. The SQL queries need the information in the Database Connections Library to locate your System Data Source Name (DSN).

To create a Database Connections Library

1 From the AM Navigation area, select Libraries, Database Connections, and then click Add. The Add Database Connections screen opens to the Name subtab.

2 Use the information in the following table to complete the fields and click OK:

Field	Description
Name	Type the name for the Database Connection.
Description	Type a description for the Database Connection.

Creating a Departments Library

You can create a library of departments to represent the various business departments in which your company's agents work. Though CCA does not consider departments when routing interactions, department assignments make agents easier to locate using the Company Directory feature of Interaction Manager (IM). For example, when agents using IM need to transfer a call to another agent using the Company Directory or Transfer to Agent dialog box, these controls identify the department in which each agent works. This additional search category makes it easier for agents to locate other agents in the company.

To create a Departments Library

1. In the navigation pane of AM, click Libraries, Departments, and then Add. The Departments screen opens.
2. Type a department name and its description in each language that you intend to support in your contact center, and then click OK.
3. Repeat steps 1 and 2 until you have added a definition for all the departments in your company.

   TIP: For information about specifying the department to which agents and supervisors belong, see Department in "Creating User Accounts" on page 183.

Deleting a Department

Before deleting a department, ensure that CCA is not using the department by checking whether the department assignment has been removed from all agents.

TIP: See Chapter 8, "Creating Administrator, Agent, and Supervisor Accounts."

To delete a department

1. Click Libraries and then Department. The Department main screen appears.
2. Select the department you created, and then click Delete.

   A confirmation message appears.
3. Click OK to confirm the deletion.

Creating a Dial List Library

Create a Dial List Library to identify speed dials (short cuts) for your agents. A *speed dial* is a function on a telephone that allows numbers to be stored in memory, and then dialed by pressing an assigned button. Therefore, instead of pressing ten or eleven digits, users press only two or three digits (including the number sign (#) or asterisk (*) key).

The added Dial Lists appears in the Speed Dial dialog in Integrated Client.

To create a Dial List Library

1. In the navigation pane of AM, click Libraries, Dial List, and then Add. The Dial List screen opens.
2. In the Name box, type a name for this dial list entry.
3. In the Description box, type a description.
4. Click Plus to add specific information for this entry. The screen refreshes to show a new row for entering specific information.
   - a. In the #Dial box, type the pound sign (#) and then one or more numbers, to assign to the actual phone, PBX, or IP number.

     CAUTION: The pound sign (#) is required.
   - b. From the Type drop-down list, select the type of call from the following:
     - Internal
     - External
     - PBX
     - IP
   - c. In the Phone Number box, type the entire phone, PBX, or IP number.
5. Repeat the last step for each additional Dial List, and when finished, click OK.

Deleting a Dial List Library

You can easily delete a Dial List Library.

To delete a Dial List Library

1. Click Libraries and then Dial List. The Dial List main screen opens.
2. Select the Dial list you created, and then click Delete.

   A confirmation message appears.
3. Click OK to confirm the deletion.

Process of Creating a Display Templates Library

You can customize the way supervisors and agents view, add, and edit contact information by creating customized display templates. AM ships with three default display templates:

- System Contact Template
- System Directory Template

- System Transfer Template

  NOTE: You can modify all three system templates. However, you cannot create a new System Transfer Template.

About Types of Customization

Table 30 provides an overview of the six main configuration options for customizing contact record storage.

Table 30. Ways to Customize Contact Record Storage

Configuration	Description
First configuration option **TIP:** Also see "About Configuration One: Out of the Box" on page 100.	In Configuration 1, you keep your contact records in the default table and use the default System Contact Template: ■ Default System Contact Template ■ Default Data Source ■ Default Contact Table ■ CCA database ■ CCA Web server
Second configuration option **TIP:** Also see "About Configuration Two: Contact Records Stored in Contacts Database" on page 101.	In Configuration 2, you keep your contact records in the default table and create a new Contact Template: ■ Custom Contact Template (create) ■ Default Data Source ■ Default Contact Table ■ CCA database ■ CCA Web server
Third configuration option **TIP:** Also see "About Configuration Three: Contact Records Stored in Default Contact Table" on page 103.	■ In Configuration 3, you keep your contact records in the default table, create a new Contact Template, and create a new Data Source: ■ Custom Contact Template (create) ■ Custom Data Source (create) ■ Default Contact Table ■ CCA database ■ CCA Web server

Table 30. Ways to Customize Contact Record Storage

Configuration	Description
Fourth configuration option **TIP:** Also see "About Configuration Four: Storing Your Contact Records" on page 106.	■ In Configuration 4, you keep your contact records in a new table that you create in the CCA database. You also create a new Contact Template and a new Data Source.Custom Contact Template (create) ■ Custom Data Source (create) ■ Custom Contact Table (create) ■ CCA database ■ CCA Web server
Fifth configuration option **TIP:** Also see "About Configuration Five: Storing Same Contact Records" on page 108.	In Configuration 5, you keep your contact records in a new table that you create in your database. You also create a new Contact Template and a new Data Source: ■ Custom Contact Template (create) ■ Custom Data Source (create) ■ Custom Contact Table (create) ■ Your database (instead of the CCA database) ■ CCA Web server
Sixth configuration option **TIP:** Also see "About Configuration Six: Storing Your Contact Records" on page 111.	■ In Configuration 6, you keep your contact records in a new table that you create in your database. You use your own Web server to manage the database connection pool. You also create a new Contact Template and a new Data Source: ■ Custom Contact Template (create) ■ Custom Data Source (create) ■ Custom Contact Table (create) ■ Your database (instead of the CCA database) ■ Your Web server (instead of the CCA Web server)

About Database and Table Requirements

The following are the database and table requirements:

- If you are using a table in your own database, the database must support JDBC.
- The primary key of the table must consist of a single column.
- You must know the structure of the table that you want to access:
  - Table name

- Column names
- Column data types
- Column max len/value;
- Primary key
- CCA expects the contact data to be in a single table. To use multiple tables, you must create a view or create your own database access component (ContactBean.class).
- The table can use only the data types of integer or string.

About Web Server Requirements

The following are the Web Server requirements:

- Your Web server must be able to configure a pool of connections on the Web server (IIS, WebSphere, Resin, and so on). This is in the web.xml file on the Web server that you want to access.
- You must install the Contact Component, which is a set of class files and JSP files.
- The Web server must have a JDBC driver to connect to your database.

  TIP: See the *Contact Center Anywhere Installation Manual*.

- The Web server must have JVM 1.4.2_03.

  TIP: See the *Contact Center Anywhere Installation Manual*.

Process of Installing the Supported Configurations

This topic describes how to install the six configuration options:

- "About Configuration One: Out of the Box" on page 100.
- "About Configuration Two: Contact Records Stored in Contacts Database" on page 101.
- "About Configuration Three: Contact Records Stored in Default Contact Table" on page 103.
- "About Configuration Four: Storing Your Contact Records" on page 106.
- "About Configuration Five: Storing Same Contact Records" on page 108.
- "About Configuration Six: Storing Your Contact Records" on page 111.

NOTE: For more information on each option, see Table 30 on page 97 for an overview of each configuration.

About Configuration One: Out of the Box

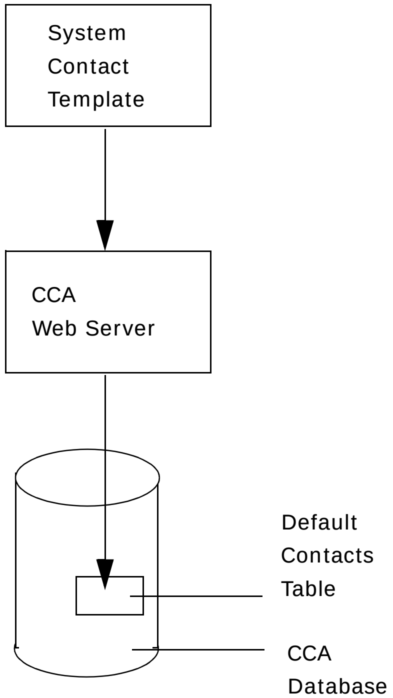


Figure 3. Configuration 1: “Out of the Box” Configuration

- An out-of-the-box configuration is when you use CCA where the following are predefined:System Contact Template
- Web Server
- Database
- Contacts table

NOTE: In configuration 1, you cannot delete the System Contact Template.

- When agents and supervisors log in, they select the System Contact List in the Contact tab. From their view, all the contact records appear in this list. From the database view, all contact records are in the default Contacts table.

Installing Configuration One

You cannot edit the System Contact Template. This template identifies the default contact record fields that agents see when they use Interaction Manager.

To install Configuration 1

1. Select Libraries, Display Templates.
2. In the Display Templates main screen, right-click System Contact, and click OK.

About Configuration Two: Contact Records Stored in Contacts Database

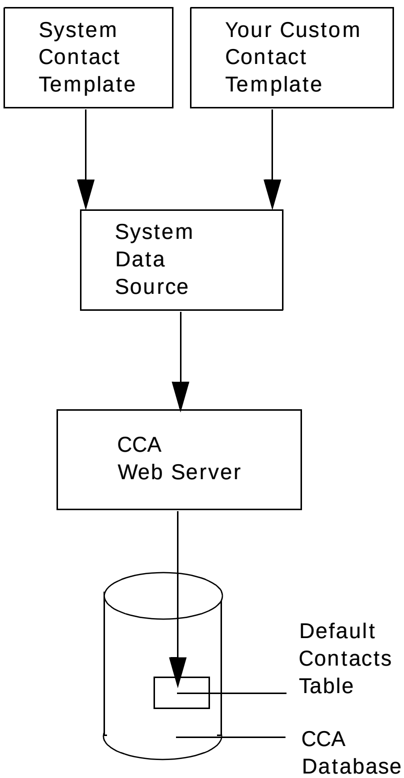


Figure 4. Configuration 2: Contact Records Stored in Contacts DB

In configuration 2:

- All contact records are stored in the default Contacts table.

- When agents and supervisors log in, they see the System Contact List and your Contact List (the name of your template). However, both lists are the same. For example, if you have 50 contact records in the System Contact List, the same 50 records appear when the agent selects your Contact List (Figure 5).

Figure 5. IM - Contact Information Drop-Down List

Installing Configuration Two

All contact records are stored in the default Contacts table.

To install Configuration 2

1. Create a new contact template.

   TIP: See "About Creating New Display Templates" on page 113 for complete information.

2. Click Libraries, Display Templates, and then Add. The Add Display Templates screen opens.
3. In the Add Display Templates screen:
   a. In the Name tab, type a unique name and description for your Contact Template.
   b. From the Data Source list box, select System Contact Datasource.
4. Click the Layout and List Header tabs to make any changes that you want, and click OK to save your changes.

About Configuration Three: Contact Records Stored in Default Contact Table

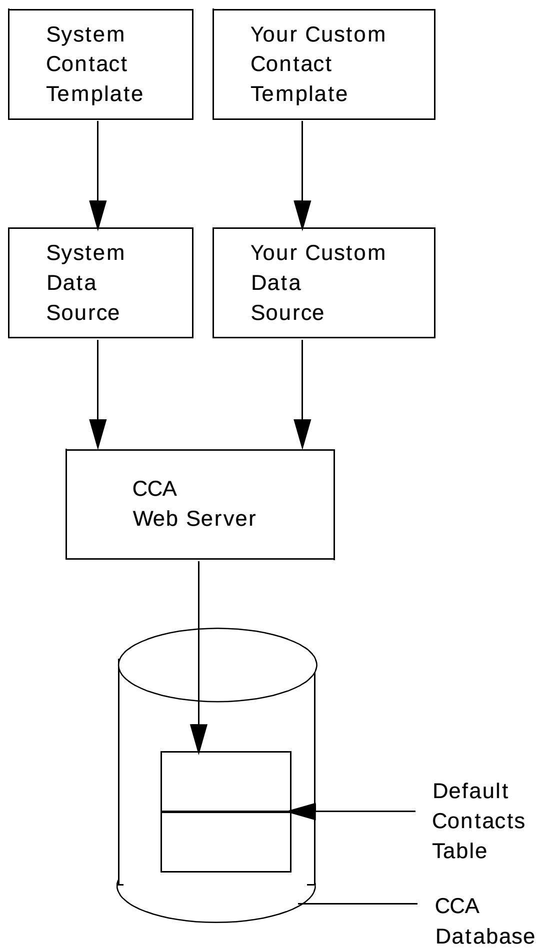


Figure 6. Configuration 3: Contact Records Stored in Default Contact Table

In configuration 3:

- All contact records are stored in the default Contacts table.
- When agents and supervisors log in, they see the System Contact List and your new Custom Contact List (the name of your new Contact Template). However, both lists are different (compare configuration 3 with configuration 2). For example, if you have 50 contact records in the System Contact List, none of them appear when the agent selects your new Custom Contact List.

NOTE: You can have separate lists of contact records in the same default Contacts table. This is because the table uses a Data Source ID column to identify which Data Source was used when the Contact record was created.

Example of an Agent Using Two Contact Lists with Different Records

You have created a new Contact Template called *US Contacts,* which uses a new Data Source. (The name of the Data Source does not matter in this example.) An agent logs in to IM, selects the System Contact List from the Contact Information drop-down list and creates three contact records: Mike Roberts, Susan Dawson, and Anthony Anderson. The agent then selects your new Custom Contact Template (named, US Contacts), which appears as an item in the Contact Information drop-down list. The agent then creates another three contact records: Evan Lewis, Steve Callard, and Joanne Ritchie. See Figure 7.

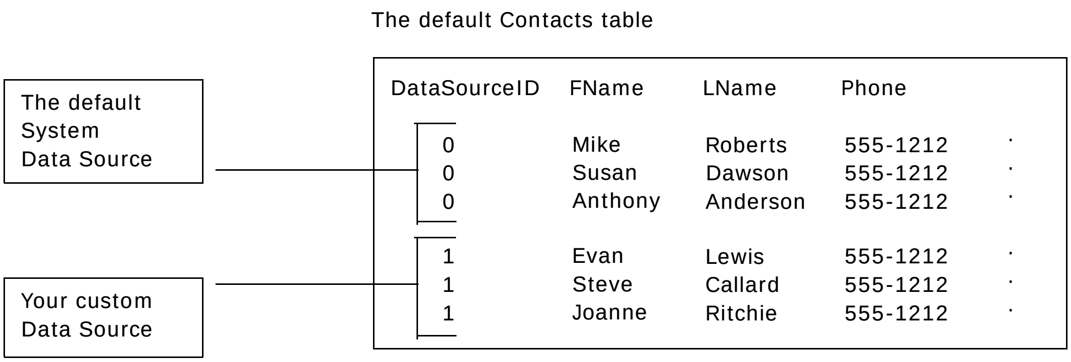


Figure 7. The Default Contacts Table

For Configuration 3, Figure 8 shows how those records appear in the database:

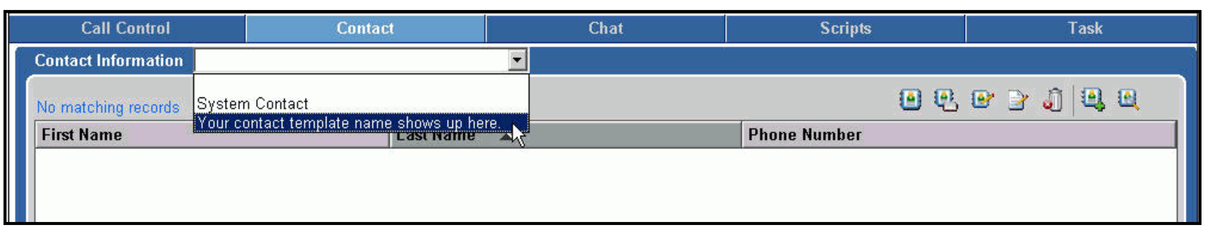


Figure 8. Two Contact Lists With Different Records

Installing Configuration Three

Follow these steps to install Configuration 3:

To install Configuration 3

1 Create a new Data Source:

   a Select Libraries and then Data Source. Then, select Add. The Add Data Source screen opens.

   b In the Name tab, type a unique name and description for the Data Source.

   c In the Data Source tab:

- Under Data Format, click System Default.
- Under Database Pool Name, click System Default.
- Under URL, click System Default.

d Click OK to save your changes.

2 Create a new Contact Template:

TIP: See "About Creating New Display Templates" on page 113 for complete information.

a Select Libraries and then Display Templates. Then, select Add. The Add Display Templates screen opens.

b In the Name tab:

- In the Label Name column, type a unique name for your new Contact Template.
- From the Data Source drop-down list, select the name of the new Data Source that you created in the previous step

c Click the Layout and List Header tabs, and make any changes, and click OK to save your changes.

When an Agent logs in, your new Custom Template is not selected by default. However, you can assign your new Custom Template to a project, so that when CCA routes a call to that project, the system searches your new data source in an attempt to make the contact assignment.

About Configuration Four: Storing Your Contact Records

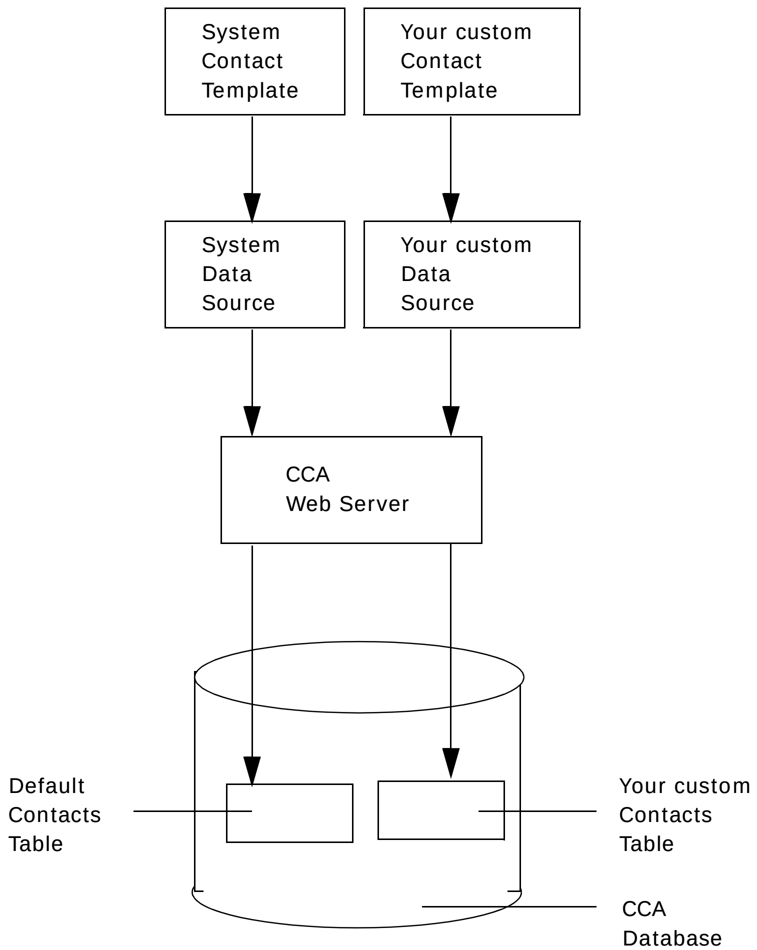


Figure 9. Configuration 4: Storing Your Contact Records

In configuration 4:

- You can store some or all of your contact records in the new table that you create in the CCA database.
- When the agents and supervisors log in, the System Contact List and your new Custom Contact List (the name of your new Contact Template) appears. However, both lists are different (compare configuration 4 with configuration 2). For example, if you have 50 contact records in the System Contact List, none of them appear when the agent selects your new Custom Contact List.

  NOTE: The fact that system contact records exist in one table and your other contact records are in another table is transparent to agents and supervisors.

Installing Configuration Four

Follow these steps to install Configuration Four:

To install Configuration 4

1 Create your new custom table in the CCA database, and ensure the following:

- Your contact data must be in a single table or a view.
- The primary key for your contact table must consist of a single column.
- The columns in your contact table must use a data type of integer or string.

2 Create a new Data Source:

a Select Libraries and then Data Source. Then, select Add. The Add Data Source screen opens.

b In the Name tab, type a unique name and description for the data source.

c In the Data Source tab, under Data Format, select User Defined. A new box appears.

d Click Plus. The column heading appears.

e Type the Table Name, Field Name, Field Type, and Max Length of the first column in your custom Contact table.

NOTE: Enter only the columns that you want agents and supervisors to see when they log in. If you have a column in your new custom Contacts table that you do not want agents and supervisors to see, do not add it in the Data Source screen. If you add a column, you can always hide it from users later when you create your new custom Contact Template.

f Under Database Pool Name, click System Default.

g Under URL, click System Default, and click OK to save your changes.

3 Create a new Contact template:

TIP: See "About Creating New Display Templates" on page 113 for complete information.

a Select Libraries and then Display Templates. Then, select Add. The Add Display Templates screen opens.

b In the Name tab:

- ❑ In the Label Name column, type a unique name for your Contact Template.
- ❑ From the Data Source drop-down list, select the name of the Data Source that you created in the previous step.

c Click the Layout and List Header tabs, and make any changes, and click OK to save your changes.

4 You can assign your new template to a project.

When an agent logs in, your new template is not selected by default. However, when CCA routes a call to that project, the system searches your new data source in an attempt to make the contact assignment.

About Configuration Five: Storing Same Contact Records

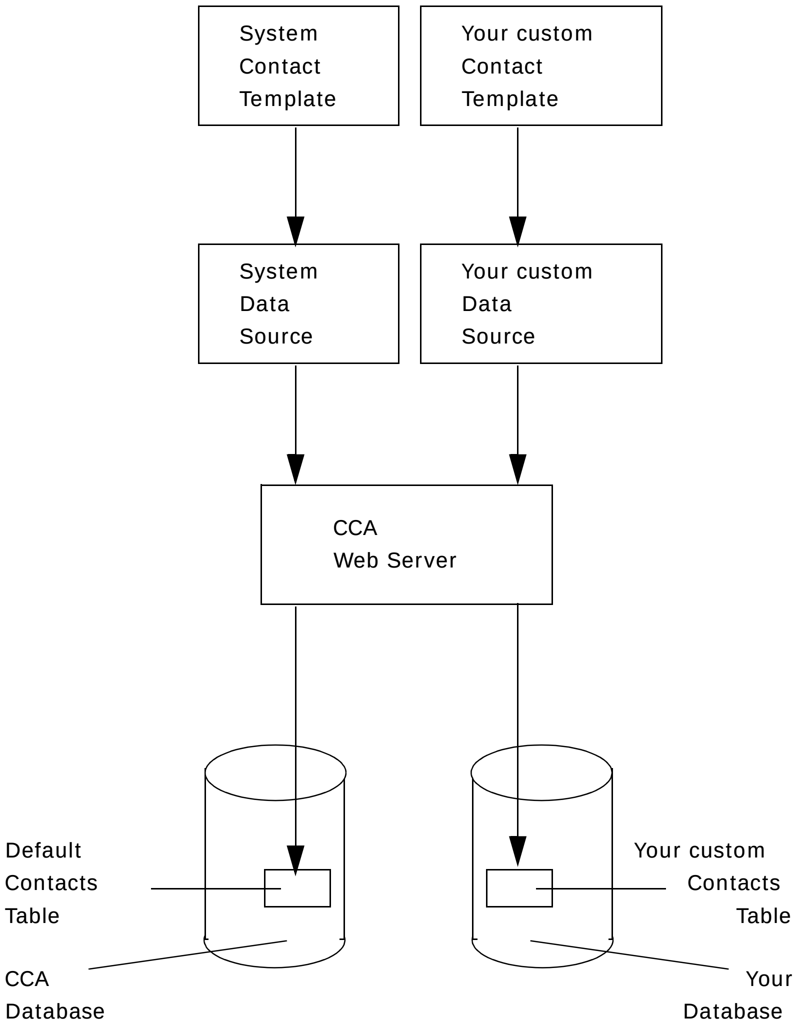


Figure 10. Configuration 5: Storing Some Contact Records

In configuration 5:

- You can store some or all of your contact records in the new table that you create in your database.

- When agents and supervisors log in, they see the System Contact List and your new Custom Contact List (the name of your Contact Template). However, both lists are different (compare configuration 5 with configuration 2). For example, if you have 50 contact records in the System Contact List, none of them appear when the agent selects your new Custom Contact List.

  NOTE: The fact that the system contact records are in one database, and your other contact records are in another database is transparent to both agents and supervisors.

Installing Configuration Five

Follow these steps to install configuration five:

To install Configuration 5

1. Verify that your new database supports JDBC.
2. Create a new Contact table in your database, and ensure the following:
   a. Your Contact data must be in a single table or a view.
   b. The primary key for your Contact table must consist of a single column.
   c. The columns in your Contact table must use a data type of integer or string.
3. Create a new Data Source.
   a. Select Libraries and then Data Source. Then, select Add. The Add Data Source screen opens.
   b. In the Name tab, type a unique name and description for the data source.
   c. In the Data Source tab:
      - Under Data Format, click User Defined. A new box (Figure 5 on page 102) appears.
      - Click Plus. The column headings appear (Figure 5 on page 102).
      - Type a Table Name, Field Name, Field Type, and Max Length of the first column in your custom Contact table.

      NOTE: Enter only the columns that you want agents and supervisors to see when they log in. If you have a column in your new custom Contacts table that you do not need agents and supervisors to see, you do not need to add it in the Data Format screen.

      TIP: If you do add a column, you can always hide it from users later when you create your new custom Contact Display Template.
   d. Under Database Pool Name, click User Defined, and type the name of the database that you entered in your web.xml file.
   e. Under URL, click User Defined, and type the URL of your Web server in the text box, and click OK to save your changes.
4. Create a new Contact template:

   TIP: See “About Creating New Display Templates” on page 113 for complete information.

a Select Libraries and then Display Templates. Then, select Add. The Add Displays Templates screen opens.

b In the Name tab:

- In the Label Name column, type a unique name for your Contact Template.
- From the Data Source drop-down list, select the name of the Data Source that you created in the previous step.

c Click the Layout and List Header tabs, and make any changes, and click OK to save your changes.

5 You can assign your new template to a project. When an Agent logs in, your new template is not selected by default. However, but when CCA routes a call to that project, the system searches your new data source in an attempt to make the contact assignment.

About Configuration Six: Storing Your Contact Records

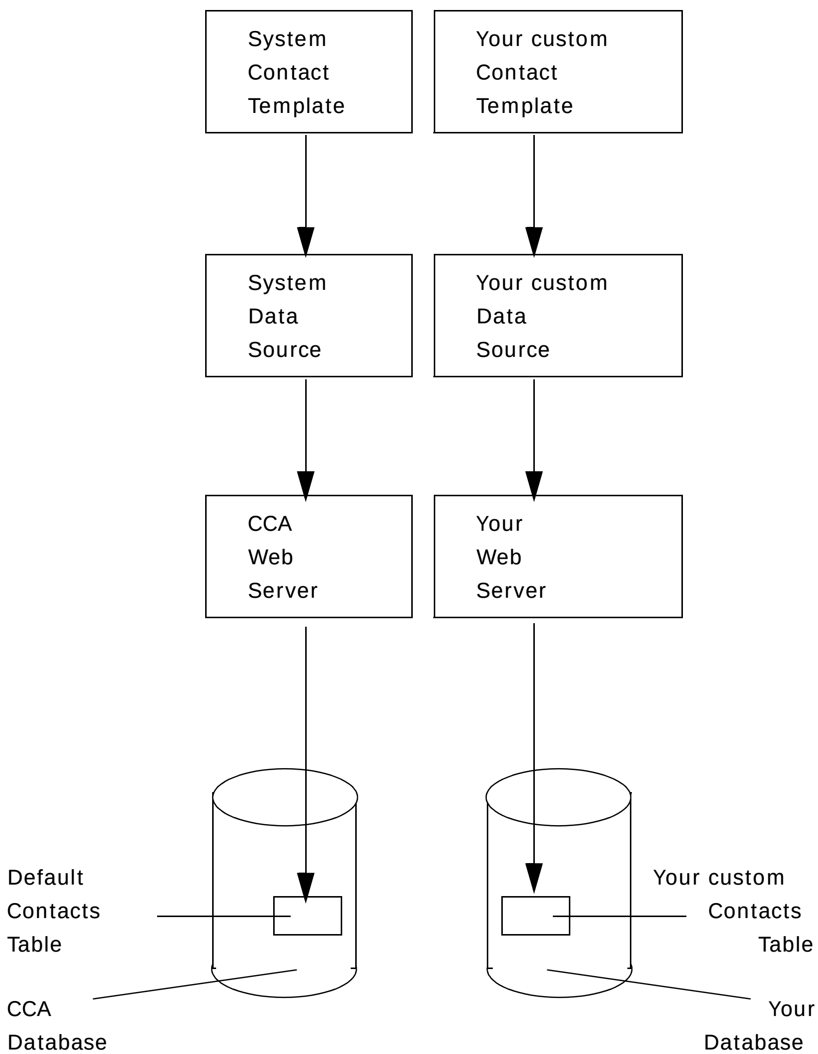


Figure 11. Configuration 6: Storing Your Contact Records

In configuration 6:

- You can store some or all of your contact records in the new table that you create in your database.
- You can manage the connection pool to your database with your own Web server.

- When agents and supervisors log in, they see the System Contact List and your new Custom Contact List (the name of your Contact Template). However, both lists will be different (compare configuration 6 with configuration 2). For example, if you have 50 contact records in the System Contact List, none of them appear when the agent selects your new Custom Contact List.

  NOTE: The fact that system contact records exist in one table and your other contact records are in another table is transparent to agents and supervisors.

Installing Configuration Six

Follow these steps to install Configuration Six:

To install Configuration 6

1. Configure your Web server:
   a. Create a connection pool in your Web server for your database.
   b. Install the CCA Contact Component on your Web server.
   c. Verify that your Web server has a JDBC driver that can connect to your database.
   d. Install JVM 1.4.2_03 on your Web server.
2. Verify that your new database supports JDBC.
3. Create a new Contact table in your database:
   a. Your contact data must be in a single table or a view.
   b. The primary key for your contact table must consist of a single column.
   c. The columns in your contact table must use a data type of integer or string.
4. Create a new Data Source:
   a. Select Libraries and then Data Source. Then, select Add. The Add Data Source screen opens.
   b. In the Name tab, type a unique name for the data source.
   c. In the Data Source tab:
      - Under the Data Format, click User Defined. A new box appears (Figure 5 on page 102).
      - Click Plus. Row headings appear (Figure 5 on page 102).
      - Type the Table Name, Field Name, Field Type, and Max Length of the first column in your custom Contact table.

      NOTE: Enter the columns that you want agents and supervisors to see when they log in. If you have a column in your new custom Contacts table that you do not want agents and supervisors to see, do not add it in the Data Format screen.

      TIP: If you do add a column, you can always hide it from users later when you create your new custom Contact Display Template.

- Under Database Pool Name, click User Defined, and type the name of the database that you entered in your web.xml file.
- Under URL, click User Defined, and type the URL of your Web server, and click OK to save your changes.

5 Create a new Contact template:

TIP: See “About Creating New Display Templates” on page 113 for complete information.

a Select Libraries and then Display Templates. Then, select Add. The Add Display Templates screen opens.

b In the Name tab:

- In the Label Name column, type a unique name for your new Contact Template.
- From the Data Source drop-down list, select the name of the new Data Source that you created in the previous step.

c Click the Layout and List Header tabs, and make any changes, and click OK to save your changes.

6 You can assign your new custom template to a project. When an agent logs in, your new template is not selected by default. However, when CCA routes a call to that project, the system searches your new data source in an attempt to make the contact assignment.

About Creating New Display Templates

AM provides three default display templates:

- **System Contact Template.** You cannot delete the System Contact Template, but you can create a new System Contact Template. By default, contact records are stored in the CCA database. You can customize the storage of your contact records by using Data Sources.

  TIP: See “About Types of Customization” on page 97 for more information.

- **System Directory Template.** You can use this template as it is, or you can customize it, changing the way agents and supervisors view and search in the Company Directory dialog box in Interaction Manager.

  NOTE: You cannot create new Directory Templates.

- **System Transfer Template.** You can use this template as it is, or you can customize it, changing the way agents and supervisors view and search in the Transfer dialog box in Interaction Manager.

  NOTE: You cannot create new Transfer Templates.

Process of Creating Contact Templates

A *contact* is anyone who has called, emailed, or started a Web chat with a contact center. Agents and supervisors use the Contact tab in IM to create contact records and associate the record with a phone number or email address. The contact record usually contains information (such as name, address, phone number, email address, and so on), but can also contain agent notes.

Creating a New Contact Template

When a customer reaches the contact center, IM automatically shows the customer's contact record to the agent. Using Contact Templates you can customize the way supervisors and agents view, add, and edit contact information. AM comes with a default template for contacts (the System Contact Template). You cannot modify or delete this template, but you can create your own.

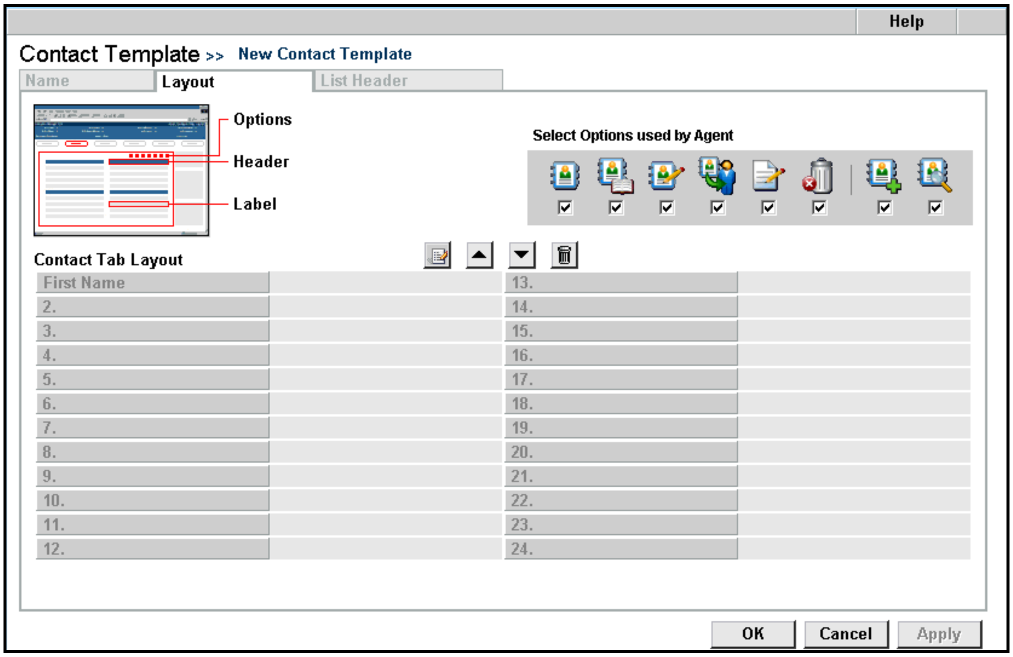
To create a new Contact Template

1. Select Libraries and then Display Templates. Then, select Add. The Add Display Templates screen opens.
2. Use the information in the following table to complete the Name tab:

Item	Description
Label Name	The label name appears in the list of templates after clicking the Contact Templates link in AM. The label name also appears to agents and supervisors when they log in to IM. For example, enter the string "Contacts Sud Californiens" as a French Label Name. When an agent logs in to IM, the agent chooses French as the language. When agent clicks the Contact Information drop-down list (in the Contacts tab), the string "Contacts Sud Californiens" appears as a menu item.
Description	The description appears in the list of templates after clicking Contact Templates in IM.
Data Source	The location where information is stored. (AM provides a default System Data Source already configured for use.)
Assign New Contacts Automatically	Select this check box so that an agent or supervisor can create a new contact record during a current interaction, and CCA automatically assigns it to the current interaction.

3. Click Apply.

4 Click the Layout tab to customize the screen that agents and supervisors see when they add and view contacts.



The Label field holds some information about a contact (such as the first name, last name, phone number, and so on). Agents and supervisors complete these fields when adding or editing contact information. A Header, like a column heading, serves as a title for several fields (such as, Contact Information or Additional Phone Numbers).

a Use *Options Used by Agent* to control how much access agents and supervisors have to contact information.

b Use the four buttons in the center of the tab to add or delete labels and headers, and change their position. In addition, you can click a label or header, and drag it to a new location.

NOTE: It might be easier to create a Contact Template when running two Web browsers:

In the first browser, log in to AM. In the second browser, log in to IM as an agent, and click the Contact tab.

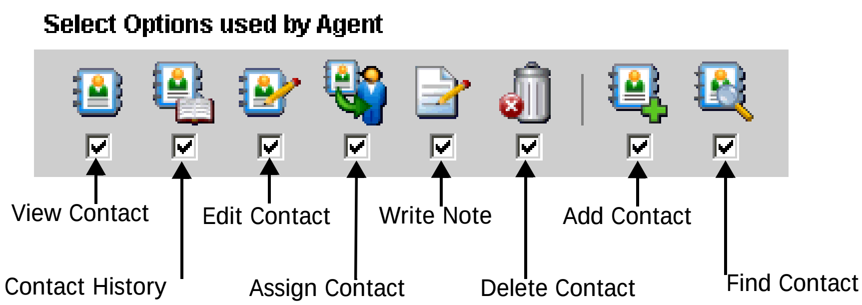
With the two browsers open, you can view your change to the Contact Template in IM. However, you must log out of IM and log back in each time you make a change to the template in AM.

Creating a Sample Contact Template

The following steps describe how to create a sample Contact Template:

To create a sample Contact Template

1. Select Libraries and then Display Templates. Then, select Add. The Add Display Templates screen opens.
2. Select the Layout tab. The Contact - Layout screen opens.
3. Under Select Options used by Agent, click each option that you want to make available to the agents.



Use the following table to understand each option:

Agent Option	Meaning
View Contact	Agents and supervisors can view current interactions for the contact.
Contact History	Agents and supervisors can select a contact and view all interactions for that contact.
Edit Contact	The agent can change or delete the information in the contact record.
Assign Contact	Agents and supervisors can assign a contact to a customer.
Write Note	Agents and supervisors can attach a note to a contact. **NOTE:** Each contact can have multiple notes using a maximum of 1024 characters for each. (Agents and supervisors view notes from the Contact tab, View Contact button, and History tab.)
Delete Contact	Agents and supervisors can delete the contact from the list. **NOTE:** CCA does not remove permanently deleted contacts from the data source, and flags them only as deleted. However, only a user with direct access to the data source can change the deletion flag and restore the contact information. You cannot restore contact information from AM. **TIP:**
Add Contact	Agents and supervisors can add contacts.
Find Contact	Agents and supervisors can access a contact search screen.

4. Edit the Labels and Headers for the Contact Template:

a. Under Contact Tab Layout, double-click the first position (1.) The Edit Label/Header - Label dialog box appears.

   TIP: You can also click the Edit icon.

b. Click Header. The Defined Label - Header dialog box opens.

5. In the second column, type a name for the corresponding header, such as Contact Information next to English (US).

   Type a name in every possible language agents might select when logging in to IM. If you do not have a specific language preference, you can either leave it blank, or copy the name from your most commonly used language.

6. Click OK to save your new Header. The Add Display Templates screen (Figure 9 on page 106) reappears.

7. Double-click field number 2.

8. Select Label. The Edit Label/Header Dialog Box: Label (Figure 11 on page 111) appears.

9. Use the information in the following table to complete this dialog box:

Field	Description
Name	Type a name in several different languages. In AM, this name appears in the Contact Template and then Layout tab. In IM, this name appears when an agent or supervisor click the Contact tab. For example: ■ English: Home Address ■ French: Adresse personnelle ■ German: Heimadresse If an agent selects French language when logging in to IM, then CCA displays a field called, Adresse personnelle, when the agent views, edits, or searches for contacts. If an agent selects English when logging in to IM, then CCA displays a field called, Home Address.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Associate Label with Action

Category</td><td>From the drop-down list, select an action to associate with this label.

TIP: Table 31 on page 121 provides a complete list of actions to associate with a label.

For example, to associate the “Email” label with an action to open a new email message using the contact’s email address, follow these steps:
■ Enter Email as the Label Name.
■ Select Email from the Associate Label with Action list box.
■ Select contacts.email from the Field Name list box.

When an agent or supervisor views a contact in IM, the contact’s email address appears as a hyperlink. When the agent clicks the hyperlink, IM opens a new mail message (using the agent’s mail program) with the contact’s email address in the To line.

NOTE: If you select Other, the label will not be associated with an action.</td></tr>
<tr><td>Mandatory field</td><td>Select this check box to make the associated action (identified in the previous field) mandatory.</td></tr>
<tr><td>Country Code Field Name</td><td>This field appears in the Edit Label/Header dialog box only if you select one of the following from the Associate Label with Action drop-down list:
■ Phone
■ Fax
■ Pager

For these menu items, select contacts.country from the Country Code Field Name drop-down list. Thus, when the agent views a contact in IM, the contacts.country field appears as a drop-down list of country codes.</td></tr>
<tr><td>Field Name</td><td>Field names correspond to locations in the data source (such as a column in a database table or view) where information is stored.

NOTE: When using the default system data source, CCA creates a set of fields. When using a custom data source, you must create the fields yourself.</td></tr>
</table>

10 For this example, use this information:

- Label Name: First Name
- Action: Other
- Field Name: contacts.firstname

11 Click OK to save your new label. The Add Display Templates screen reappears, showing the new field in the contact tab layout.

12 To create two more labels, add the following information:

- Label Name: Last Name

- Action: Other
- Field Name: contacts.lastname
- Label Name: Home Phone
- Action: Phone
- Field Name: contacts.homephone

13 When finished, the Layout tab reappears showing the new information.

Deleting a Label and Header

You can easily delete a label and header.

To delete a label and header

Delete labels and headers by selecting the label or header, and clicking Delete.

Rearranging Labels and Headers

You can easily rearrange the order of labels and headers.

To rearrange labels and headers

Rearrange labels and headers by clicking the up or down arrows, or by clicking the label or header and dragging it to a new position.

Examples of Complex Layouts

The sample in Figure 12 shows a simple layout. However, you can also create layouts that are more complex, such as with two headers in the same column (Figure 12) and multiple headers in two columns (Figure 13).

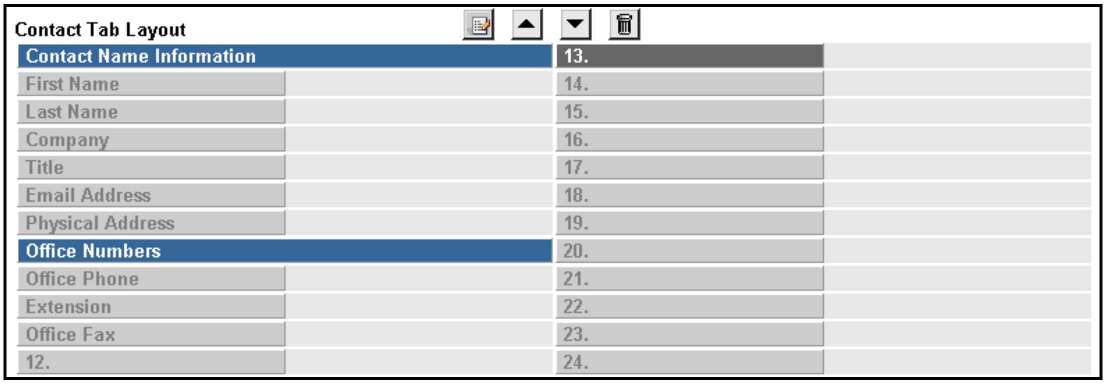


Figure 12. Sample Layout: Two Headers in Same Column

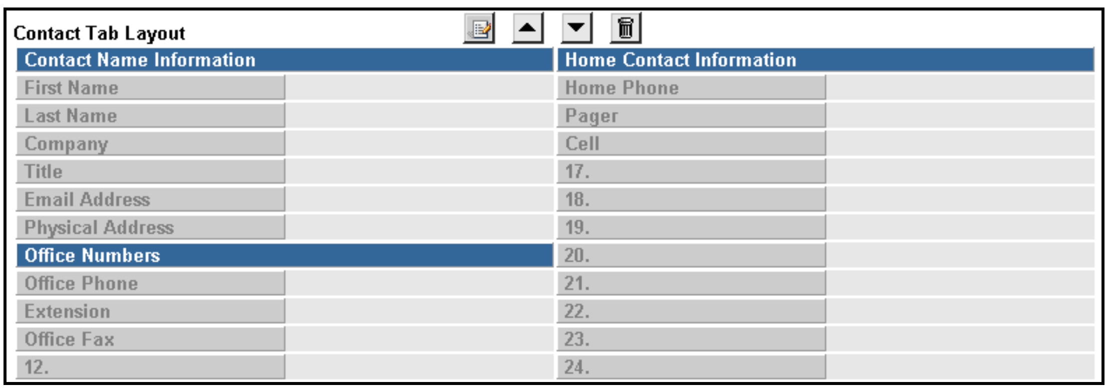


Figure 13. Sample Layout: Multiple Headers in Two Columns

NOTE: Remember that the appearance of your layout is exactly what agents and supervisors see when viewing and editing contacts in IM.

Table 31 provides a description of the label action categories available from the Associate Label with Action - Category drop-down list.

Table 31. Label Action Categories

List Box Selection	Action That Occurs in Interaction Manager
Email	The contact's email address appears a hyperlink, so that when the agent clicks the hyperlink, IM opens a new mail message (using the agent's mail program), with the contact's email address in the To line.
Phone	The contact's phone number appears as a hyperlink, so that when the agent clicks the hyperlink, IM dials the number.
Fax	The contact's fax number appears as a hyperlink, so that when the agent clicks the hyperlink, IM dials the number.
Web Site	The Web site appears as a hyperlink, so that when the agent clicks the hyperlink, IM launches a browser on the agent's machine and opens the site.
Pager	The contact's pager number appears as a hyperlink, so that when the agent clicks the hyperlink, IM dials the number.
External Application	A hyperlink to an external application appears, so that when the agent clicks the hyperlink, IM launches the application.

Selecting the Columns the Agent Sees When Viewing a List of Contacts

You can decide which columns the agent will see when viewing a list of contacts.

To select the columns the agent sees when viewing a list of contacts

1. In the Add Display Templates screen, click the List Header tab. The Add Display Templates - List Header screen appears.
2. Click any column heading (None). A list box appears showing all of the labels you created in the Layout tab.
3. Select an item from the menu, which becomes the column heading. For example, select First Name from the pop-up list box. *First Name* appears as the first column heading.
4. Do the same for columns 2 and 3, selecting Last Name and Phone Number, respectively.

   When finished, the List Header tab displays the new column headings, and click OK to save your changes.

   NOTE: Agents and supervisors must log out and log back in to IM before they can see the changes.

Deleting a Custom Contact Template

You cannot delete System Templates. However, you can delete Contact Templates that you have created.

To delete a custom contact template

1. Select Libraries and then Display Templates. The Display Templates main screen opens.
2. Select the Contact Template you created, and then click Delete. A confirmation message appears, and click OK to confirm the deletion.

Editing a Custom Contact Template

You cannot edit the default System Contact Template, but you can edit a contact template you made. Also, you cannot delete the default System Contact Template.

To edit a custom contact template

1. Select Libraries and then Display Templates. The Display Templates main menu opens.

   Select the template to change, and click Edit. The Edit Display Templates screen opens.
2. In the Name tab, modify the name and description of your custom Contact Template in different languages.

   The agents and supervisors see this name after selecting a Contact Template in IM.

   TIP: See “Label Name” on page 114 for more information.
3. Click the Layout tab, where you can:
   - Change the options agents use.

     TIP: See Table on page 114 for information about customizing Agent access to contact information.
   - Create, delete, and edit labels and headers.
   - Rearrange labels and headers to organize the System Contact Template differently.

     A Label holds some information about a contact (such as first name, last name, phone number, and so on). Agents and supervisors complete these fields when adding or editing contact information.

     A Header (like a column header in a table) serves as a title for several fields (such as Contact Information or Additional Phone Numbers).
4. Click the List Header tab to select the columns that agents see when viewing a list of contacts, and click OK.

   TIP: Instructions for changing the List Header starts in Step 1 on page 121.

   NOTE: Agents and supervisors must log out and log in to IM before they can see any changes.

Restoring a System Template

After making changes to any System Template, you can restore all default settings.

To restore a system template

1. Select Libraries and then Display Templates. The Display Templates main menu opens.
2. Select the System Template, and click Edit.
3. In the Name tab, click the Restore Default Contact Template button.

   NOTE: Agents and supervisors must log out and log back in to IM before they can see the changes.

Creating a DNIS Library

A *Dialed Number Identification Service* (DNIS) is a service that tells the recipient of a telephone call the telephone number dialed by the person making the call. It is used by contact centers hosting multiple numbers, voicemail systems and ISPs offering shared dial-in services.

If you provide CCA services for a company that handles telephony interactions, you must create a list of telephone numbers reserved for that company's phone projects. The company's administrator can then choose from these lists of phone numbers when creating phone projects.

Use the DNIS Libraries to supply the reserved phone numbers for handling calls from customers who reach the company's phone projects. You can assign multiple DNIS numbers to a single project or to an agent who has Direct Inward Dialing. You can then manually add the numbers or upload them from a .csv file.

To create a DNIS Library

1. From the AM Navigation pane, click Libraries, click DNIS Library, and then click Add. The Add DNIS Library main page opens.
2. In the Name text box, enter the name of the DNIS list.
3. In the Description text box, type a description of the projects this list supports.
4. Click Plus. CCA adds a blank line for adding a DNIS entry.
5. An administrator can upload a list of numbers from a .csv file by clicking Upload. The Upload DNIS List box opens.
   a. Type the name of the list.
   b. Tell CCA where the CSV file resides on the hard drive by clicking Browse, and then finding the CSV file, and click OK.

   CCA imports your DNIS list.

   A *phone number list* is a CSV (comma separated variable) file that contains the phone numbers to call to a phone project or agent. Only a few restrictions apply to a phone number list:

- The phone number list must be in CSV format.
- The phone number list must have one column containing phone numbers.

6 Click OK again.

7 Repeat these steps until you have added all the phone numbers you compiled in question 2 of the *Planning Survey*.

TIP: See “Question 2: What Numbers Will Telephone-Customers Dial to Reach the Contact Center?” on page 24.

To delete a phone number from a list, select it, and then click Delete.

Deleting a DNIS Library

Before deleting a DNIS Library, make sure CCA is not using the library by doing the following areas:

- Removing the DNIS library assignment from all projects.
- Removing the DNIS library assignment from all agents who have Direct Inward Dialing

TIP: See Step 8 on page 192 in Chapter 8, “Creating Administrator, Agent, and Supervisor Accounts.”

To delete a DNIS Library

1 Click Libraries, and then DNIS Library. The DNIS Library main screen opens.

2 Select the DNIS list you created, and then click Delete.

A confirmation message appears.

3 Click OK to confirm the deletion.

Creating an Email Acknowledgments Library

You can compile a library of email responses to send automatically in response to a customer who emails the contact center.

To create an Email Acknowledgements Library

1 In the navigation pane of AM, click Libraries, Email Acknowledgements, and then Add. The Email Acknowledgments screen opens.

2 In the Email Acknowledgement Name box, type an email acknowledgement name.

3 In the Description text box, describe the purpose or content of this email response.

4 In the Subject text box, type a subject line for this response:

a If the customer’s original email Subject line was blank, CCA uses the information in this text box for the Subject of the email.

b If the customer's original email message contains a subject, CCA uses the customer's subject content.

5 In the Filename text box, type the name of the text file that contains the text to place into the body of the email message to the customer. (Or, click the Browse button to locate a file to use from your computer or network.)

NOTE: The file must be a text file (.txt) or a Web file (.html).

6 Click the View button to preview the file you selected, and click OK.

7 Repeat steps 1 through 6 to enter all of your Email Acknowledgments.

Deleting an Email Acknowledgement Library

Before deleting an Email Acknowledgement Library, make sure CCA is not using the Email Acknowledgement by checking whether the Email Acknowledgement assignment was removed from all email projects.

TIP: See "Adding Email Interactions to a Project" on page 328.

To delete an Email Acknowledgement Library

1 Click Libraries, and then Email Acknowledgement. The ACK main screen opens.

2 Select the ACK you created, and then click Delete.

A confirmation message appears.

3 Click OK to confirm the deletion.

Creating a Fax Library

You can compile a library of pre developed fax responses, which your agents can use to send to customers. The Fax Library ensures that agents provide accurate and consistent responses to all customers.

CAUTION: You must store CCA fax responses as Tagged Image File Format (TIFF) files in the Fax Library. When saving your fax responses, select Class F with CCITT Group 3 1D compression to ensure compatibility with CCA and your telephony hardware.

To create a Fax Library

1 In the navigation pane of AM, click Libraries, Faxes, and then Add. The Add Fax screen opens.

2 Enter a Fax Name.

3 In the Description text box, describe the purpose or content of this fax.

4 In the Select TIF file text box, enter the path to the image file that will be faxed to the customer (or click Browse to locate the file on your computer or network).

5. Click View to display the fax on your screen to verify it is correct, and click OK.
6. Repeat steps 1 through 5 until you have entered all of your faxes.

Deleting a Fax Library

Before deleting a fax library, make sure CCA is not using the fax by removing the fax from all projects.

To delete a Fax Library

1. Click Libraries and then Faxes. The Fax main screen opens.
2. Select the fax you created, and then click Delete.

   A confirmation message appears.
3. Click OK to confirm the deletion.

About the Hostname and Agent Phone Library

For CCA to connect a call to an agent, CCA must determine:

- Which computer the agent is using
- Which phone is associated with that computer

Usually, CCA retrieves this information when:

- The agent logs in to IM. During the login, the agent's name and computer hostname are sent to the server.
- The agent uses the Configuration dialog box in IM, or an administrator uses the Phone screen (from Options, Agents) to tell the server which phone the agent is using.

This process works well in contact centers where agents use the same computer and phone every day. But in some contact centers, agents can move from one computer and phone to another. In this case, every time an agent logs in, the agent must open the Configuration dialog box, and tell the application about the phone, or an administrator must do this for the agent.

> **NOTE:** It is assumed that the agent or an administrator knows the IP addresses and extension, address, or ID of every phone and computer.

Creating a Hostname and Agent Phone Library

With CCA's Hostname/Agent Phone mapping feature, you can associate a computer with a phone, so that when an agent logs in to IM on a machine, the server:

- Retrieves the agent's name and the computer hostname

- Performs a lookup to identify which phone is associated with the computer the agent is using

This is all the information the server needs. By associating a phone with a computer, CCA can gather this information no matter which computer the agent uses.

To create a Hostname and Agent Phone Library

1. In the navigation pane of AM, click Hostname/Agent Phone Mapping.
2. Click Add. The Hostname/Agent Phone Mapping screen opens.
3. Use the information in the following table to complete the Pattern Matching Groups screen, and click OK:

Field	Description
Hostname	Type the hostname of the computer that the agent is using.
Description	Type a description for the mapping.
H323	Select this option if the agent uses a H323 system. Type the IP address in the Address box.
SIP	Select SIP if the agent uses a SIP system. Type the IP address in the Address box.
PBX	Select this option if the agent is a member of a Public Branch Exchange system. Type the agent's PBX extension number in the Phone box.
Outside phone	Select this option if the agent works remotely. Enter the agent's country code and telephone number in the Country and Phone boxes, respectively.
Dialogic Analog Extension	Select this option if the agent is a member of an MSI system. Type the MSI ID number in the MSI ID box. Users can select to have their MSI extensions to work off-hook. In this case, no dial tone sounds and beeps play when a call is incoming. With off-hook, users can also have calls auto-accepted without having to answer the headset for each call.

4. Repeat steps 2 and 3 until you have created all the Hostname/Agent Phone Mappings you contact center needs.

Deleting a Hostname or Agent Phone Mapping

Deleting a hostname/agent phone mapping creates a “free space” in the CCA database. It also ensures that an invalid hostname will not appear in the AM screen.

To delete a Hostname or Agent Phone Mapping

1. Click Libraries and then Hostname/Agent Phone Mapping. The Hostname/Agent List screen opens.
2. Select the hostname you created, and then click Delete.

   A confirmation message appears.
3. Click OK to confirm the deletion.

Creating an Intelligent Chat Template Library

You can use the Intelligent Chat templates to scan the content of incoming chat interactions for specific keywords and provide suggested responses to your agents. Upon receiving the chat interaction, Agents can view the list of Intelligent Chat templates and the confidence score each template received based on analysis of the content of the customer's chat text. The highest scoring template is listed first, but the Agent can send the reply associated with the any of the matching templates.

Intelligent chat templates are collections of logical statements consisting of combinations of words that CCA searches for when scanning the content of incoming chat interactions.

CCA lets you compile a library from which you can choose Intelligent Chat templates to use in your Chat Projects. You can associate one or more Intelligent Chat templates with a chat project, allowing you to control which responses to suggest to your agents handling chat customers.

To create an Intelligent Chat Template Library

1. In the navigation pane of AM, click Libraries, Intelligent Chat Templates, and then Add. The Intelligent Chat Templates screen opens.
2. In the Chat Template Name text box, type the name of the first Intelligent Chat template to add.
3. In the Description text box, describe the purpose of this template.
4. From the URL drop-down list, choose the Intelligent Chat URL entry to recommend to agents who receive a chat interaction from customers whose questions match the words or phrases in this template.Type the words to search for when scanning the content of the customer's chat message:
   - Add AND for the chat to contain all of the words.
   - Add OR for the chat to contain at least one of the words.
   - Use NONE to separate the logical statements that you want to search with.

   TIP: For an explanation of how CCA uses your template when scanning an incoming chat interaction, see "Intelligent Template Example (Scoring)" on page 130.
5. Click Apply.

6 Repeat steps 1 through 5 until you have entered all the Intelligent Chat Templates necessary for all your chat projects, and click OK.

For more information on how to add your Intelligent Chat Templates to a chat project, see "Process of Adding Chat Interactions to a Project" on page 322.

Deleting an Intelligent Chat Template Library

Before deleting an Intelligent Chat Library, make sure CCA is not using the template by removing the Intelligent Chat assignment from all Chat projects.

TIP: See "Process of Adding Chat Interactions to a Project" on page 322.

To delete an Intelligent Chat Template Library

1 Click Libraries and then Intelligent Chat Template. The Intelligent Chat Template main screen opens.

2 Select the template you created, and then click Delete.

A confirmation message appears.

3 Click OK to confirm the deletion.

Creating an Intelligent Email Template Library

Intelligent email templates are collections of logical statements consisting of combinations of words, which CCA searches when scanning the incoming email interactions.

You can use intelligent email templates to scan incoming email interactions for specific keywords. When located, CCA sends an automatic response to the customer or provides suggested responses to your agents. Upon receiving the email interaction, agents can view the list of intelligent email templates and the confidence score each template received, based on the analysis of the content of the customer's email. The agent can then send the reply with the highest-scoring template.

You can compile a library of intelligent email templates for your email projects. From this library, you can specify multiple intelligent email templates to determine which actions to take (based on the content of your customer's email inquiries).

To create an Intelligent Email Template Library

1 In the navigation pane of AM, click Libraries, Intelligent Email Templates, and then Add. The Intelligent Email Templates screen opens.

2 In the email Template Name text box, type the name of the first intelligent email template to add.

3 In the Description text box, describe the purpose of this template.

4. From the URL drop-down list, choose the URL that contains the text of the email to recommend to agents who receive emails from customers whose inquiries match the words or phrases in this template.
5. From the Select Email Acknowledgment to Send drop-down list, choose a response.
6. Type the words to search for when scanning the subject line and body of the customer's email message. Then, add conditions to search for multiple words or phrases:
   - Add AND for the email to contain all of the words.
   - Add OR for the email to contain at least one of the words.
   - Use NONE to separate the logical statements that you want to search with.

   See "Intelligent Template Example (Scoring)" on page 130 for an example of how CCA uses your template when scanning an incoming email interaction.
7. Click OK.
8. Repeat steps 1 through 7 until you enter all the Intelligent Email Templates necessary for all your email projects.

Intelligent Template Example (Scoring)

When comparing the contents of a customer's incoming email or chat message with the logical statements in your templates, CCA calculates an accuracy level or score between 0 (no statements are true) and 100 (all statements are true) for each template.

Consider two intelligent email templates:

Template A:	red AND blue OR green NONE	(statement 1)
	purple NONE	(statement 2)
Template B:	red AND blue OR yellow NONE	(statement 1)
	purple NONE	(statement 2)

The CCA email project using the previous templates receives an email containing the following text: *Hello. Please send me information about your GREEN unicycles.*

CCA gives the following scores:

- Template A has a score of 50, because the email contents contained a word that is contained in 50% of the template statements. The first statement (red *AND* blue *OR* green) was true, but the second statement (purple) was false.
- Template B has a score of 0 (zero), because the email did not contain any words in either the first statement (red AND blue OR yellow), or the second statement (purple).

You can configure CCA to send a reply to the customer automatically if one of your intelligent email template exceeds a specified score. Additionally, you can configure CCA to suggest email responses to your agents, based on the intelligent email template scores.

Deleting an Intelligent Email Template Library

Before deleting an intelligent email template, make sure CCA is not using the template by removing the intelligent email assignment from all email projects.

TIP: See "Adding Email Interactions to a Project" on page 328.

To delete an Intelligent Email Template Library

1. Click Libraries and then Intelligent Email Template. The Intelligent Email Template main screen opens.
2. Select the template you created, and then click Delete.

   A confirmation message appears.
3. Click OK to confirm the deletion.

About the Interaction Outcomes Library

Outcomes describe the result of an interaction. *Sale*, *Request for Literature*, and *Complaint* are examples of outcomes you might create. With the Outcomes feature enabled, you can create administrative reports to analyze the results of all interactions handled by your agents.

Process to Use Outcomes

You can configure CCA to automatically display the Outcome Library and require your agents to choose an outcome at the end of every interaction.

- To make outcomes required for an agent, select the Required Outcomes check box for the agent using the Controls and Restrictions tab from Options, Agents.

Add required outcomes to your project using the Outcomes tab from Options, Projects.You can configure the outcomes for these interaction types:

- Workgroup emails
- Workgroup calls
- Chats
- Web callbacks
- Outbound calls
- Preview calls
- Predictive calls
- Callbacks
- Voicemails

You cannot configure the outcomes for these interaction types:

- Internal or external extension calls
- Direct inbound calls
- Direct calls

When you enable outcomes, the Outcome window appears after ending the following types of interactions:

- *Outcome without Wrap Up*: When an agent ends a call, the outcome window appears. The agent then goes into wrap-up, and selects an outcome. After selecting an outcome, wrap-up ends.

  NOTE: Wrap-up does not apply to Outbound Calls.

- *Outcome with Wrap Up*: When an agent ends a call, the outcome window appears. The agent then goes into Wrap-up:
  - If the agent selects an outcome before wrap-up ends, then the agent's status continues to be wrap-up.
  - If the agent waits longer than the wrap-up time allowed to select an outcome, then the agent's status stays in wrap-up until the agent selects an outcome.

Making Outcomes Required for Agents

You can require agents to select an outcome after finishing each interaction.

To make outcomes required for agents

1. Click Options, Agents, Add, and then the Controls and Restrictions tab.
2. Select the Require Outcome check box.
3. Create one or more outcomes.

   TIP: See "Creating Interaction Outcomes and Callbacks" on page 132.

4. Add the required outcomes to your project by clicking Options, Projects, New, and then the Outcomes tab.

   TIP: See "Adding Interaction Outcomes to a Project" on page 334.

Creating Interaction Outcomes and Callbacks

An *outcome* describes the result of an interaction. Some example outcomes include *Sale*, R*equest for Information*, *callback*, and so on.

If a customer tries to reach the contact center, either by phone or through the Web, and no agents are available, configure AM so that the customer can ask to be called back:

- If the customer requests a callback from a Web page, the customer can specify when to call back.

- If the customer requests a callback over the phone, the customer is called back as soon as an agent becomes available:
  - If the agent accepts the callback interaction, CCA calls the customer.
  - If the customer does not answer, the agent can reschedule by asking CCA to call the customer later.

In IM, the Reschedule a Callback feature is in the same dialog box as the outcomes feature. Because both features are in the same dialog box, the outcomes must also be enabled so that agents can reschedule a callback for a later time.

TIP: See "Adding Interaction Outcomes to a Project" on page 334.

To create interaction outcomes and callbacks

1. In the navigation pane of AM, click Libraries, Outcomes, and then Add. The Outcomes screen opens.
2. In the Outcome Name text box, type the name of the first Outcome from question 20 of *Administrator's Planning Survey*.

   TIP: See "Question 20: Will You Track Interaction Results?" on page 37.
3. In the Description text box, describe the results or criteria an interaction must meet to qualify for the outcome, and click OK.
4. Repeat step 1 through 3 until you have entered all the outcomes you specified on the *Administrator's Planning Survey*.

   TIP: See Chapter 3, "Planning a Contact Center."

Later, you can decide whether to activate the Mandatory Outcomes feature for your agents, which requires them to assign an outcome to each completed interaction.

Deleting an Outcome

Deleting a departed or unused outcome creates free space in the CCA database. It also ensures that an invalid Outcome will not appear in the AM screen.

Before deleting an outcome, make sure CCA is not using the outcome by checking whether the outcome has been removed from all projects.

TIP: See "Adding Interaction Outcomes to a Project" on page 334.

To delete an outcome

1. Click Libraries and then Outcome. The Outcome main screen opens.
2. Select the Outcome you created, and then click Delete.

   A confirmation message appears.
3. Click OK to confirm the deletion.

Creating a Matching Patterns Library

CCA uses matching patterns to support features like predictive dialing, where you want to call only selected customers in a Dialer List. For example, use Matching Pattern to call customers in which a string column in the Dialer List (City, State, Time Zone, and so on) matches a specific pattern.

To create a Matching Patterns Library

1. In the navigation pane of AM, click Libraries, Matching Patterns, and then Add. The Matching Patterns screen opens.
2. Use the information in the following table to complete the Matching Patterns screen, and click OK:

Field	Description
Name	Type a name that identifies the purpose of this pattern.
Pattern	Type a string pattern. Use the asterisk (*) wildcard character to match all characters in zero or more positions of the number. For example, type 9* to match all numbers beginning with 9, including 900-123-4567, 988-765-4321, 999-123-4567, and so on. This pattern does not match calls from 888-854-4224 or any other number that does not begin with 9.
Description	Type a description for this pattern to help identify it quickly in your Matching Patterns Library.

3. Repeat steps 1 and 2 until you have created all the Matching Patterns needed by your contact center.

Deleting a Matching Pattern Library

Before deleting a Matching Pattern, make sure CCA is not using the pattern by removing the pattern assignment from all Pattern Matching Group.

TIP: See "Creating a Pattern Matching Group Library" on page 142.

To delete a Matching Pattern Library

1. Click Libraries and then Matching Patterns. The Matching Patterns main screen opens.
2. Select the Matching Pattern you created, and then click Delete.

   A confirmation message appears.
3. Click OK to confirm the deletion.

Creating a Parameter Extensions Library

Create a Parameter Extensions Library to integrate each third-party application your system uses to manage other media types, such as chat interactions.

To create a Parameter Extensions Library

1. Click Libraries and then Parameter Extension. The Parameter Extension List screen opens.
2. Click Add to open the Parameter Extension Add screen.
3. Enter a name and a description for this application in the Name and Description boxes.
4. Click the plus ion to open a new dialog box for entering parameter information.
5. Use the information in the following table to complete the parameter information:

Field Information	Description
Field Name	Description
Field Name	Enter the name of the parameter.
Description	Type a short description of the parameter.
Size	Enter the size of the parameter. **NOTE:** The maximum size is 255.
Display Name	For each language, type the name that will appear in the Parameter Extensions List.

6. Click OK and click the plus icon to add another parameter.
7. When finished, you can reorder the parameters using the up and down arrow icons, edit a parameter using the edit icon, or delete a parameter using the trash can icon, and click Apply.
8. To enable Parameter Extensions, you must first create a project. For example, click Options, Projects, and then the Chat tab, where you can set the parameter extensions for a Chat Project.

   TIP: For more information, see “Setting Up a Chat Project” on page 435.

Process of Creating a Partition Library

CCA allows customers to segment their configurations within a single company. This segmentation is called a *partition*. Partitions allow you to:

- Achieve dynamic placement of users into workgroups, based on the specific customer they are handling
- Limit administrators to manage specific objects

You must define the user types and login policies for each type. You must also define the access policy for all data and business rules for these users.

About Administration Manager Types

The following is a list of CCA definitions for the different administrators:

- **Network administrator.** A super user who has full access to all data and routing rules defined for network level services and all companies. The network administrator can enable the company options and configure the Partitions Libraries.
- **System administrator.** A super user who has access to data and routing rules defined for a company. The system administrator can configure partitions and assign users to one or more partitions
- **Administrator.** This is an administrator user who has access to data and routing rules defined for a specific company within his or her assigned permissions. You can assign an administrator to multiple partitions, or to only a limited set of partitions. The administrator can then choose which partition to manage.
- **Partition administrator.** This is a restricted administrator user who has access to data and routing rules defined for a specific partition. This administrator’s capabilities are restricted by a combination of administrator configuration options and the assigned partition.

Logging Into CCA When Using Partitions

When partitions are enabled, the agents and supervisors must log in to specific partitions from the login screen. Supervisors are presented with the additional option of ALL, when logging in to the new Integrated Client version of CCA. Figure 14 shows an example login screen.

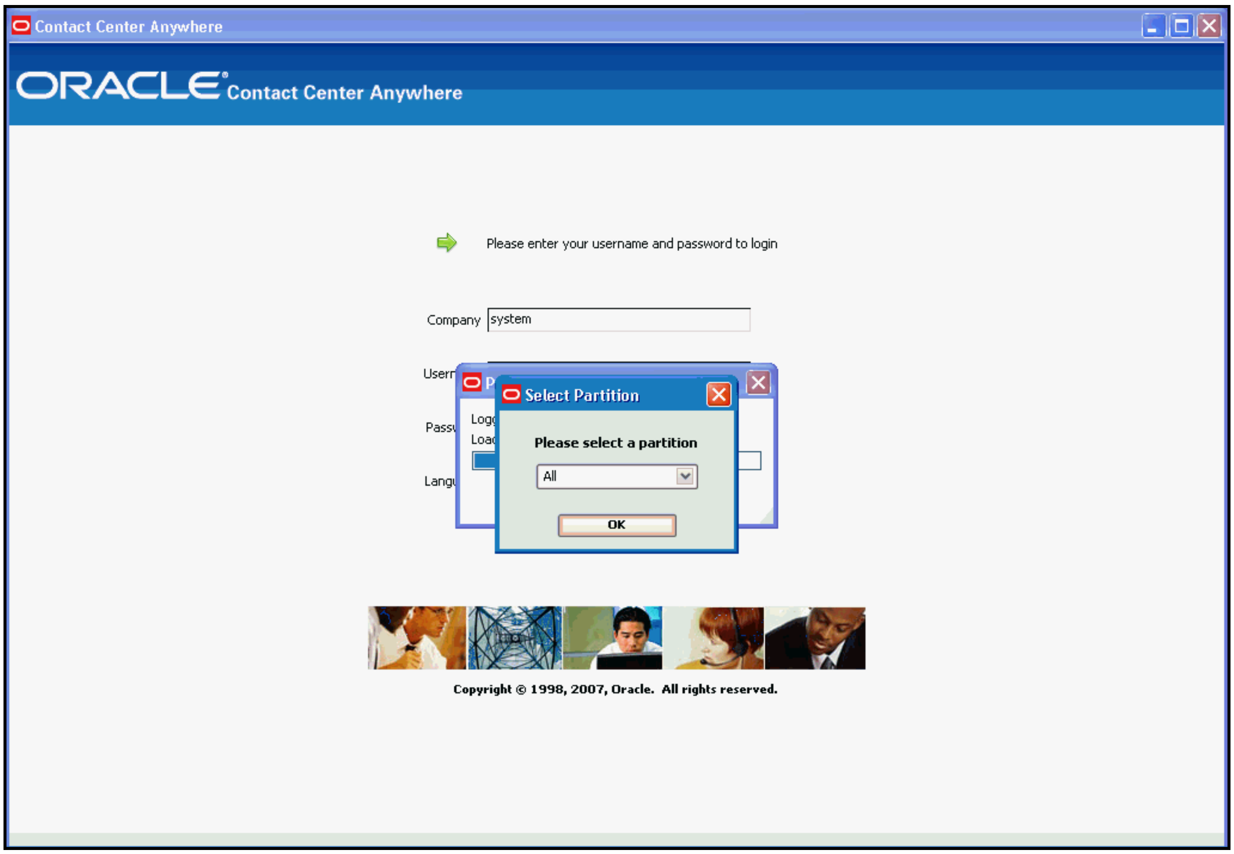


Figure 14. Integrated Client and New SM Login Partition Screen

When you enable partitions for a company, the system administrator and administrator users are not prompted for Partition Login, but can choose from the assigned partitions.

The selection appearing in the drop-down box identifies which partition the administrator is currently managing.

Creating a Partition for a Company

When Partition is enabled, a new library is introduced to define partitions. Administrators, with the system partition assigned, can manage the partitions (create, edit, delete) and assign users. The users include the network administrator, system administrator, and administrators with the system partition assigned.

To create a partition for a company

1. Click Libraries, Partitions, and then Add. The Add Partition screen opens.
2. In the Name text box, enter the name of the partition.
3. In the Description, type a description for the partition.
4. Select a project from the Billing drop-down list. (This step means that all interactions in this partition will be billed to the project that you select.)
5. Click the Assign Users tab to open the Assign Users screen.
6. Select the check box next to each agent to assign the agent to that partition.

About Segmenting Configurations

Configurations include Options and Libraries.

Options contain data that is common across all partitions and unique to a partition. A system administrator or an administrator, who has the system partition assigned, must manage common data. This helps prevent unintentional changes that might affect multiple partitions. Administrators who have a specific partition assigned to them can manage Partition Data.

Option Configuration Requirements

The following are the option configuration requirements:

- Option naming does not have to be unique across different partitions, which simplifies the job of the administrator in configuring and maintaining the systems.
- Common options are viewable by another partition, but not editable when partitions are enabled for a company, which prevents unintentional changes by the wrong administrator.

  NOTE: The Administration Configuration Option provides a workaround for mistakes, but this does not work for all options.

- Partition Options are fully manageable by an administrator assigned to the partition when partitions are enabled. This prevents unintentional changes by the wrong administrator.

  NOTE: The Administration Configuration Option provides a workaround for mistakes, but this does not work for all options.

- Previous behavior is maintained without partitions enabled. When the Partition Option is disabled (or when the Partition Feature is disabled in the company profile), the administrator cannot see any visible difference in behavior from before. The system returns to the system default partition.

Table 32 provides a summary of the option types, system partitions, and other partitions.

Table 32. Summary of Options

Options	Type	System Partition	Other Partition
Company	Common	Restrict to system only.	Make viewable only or disable user access
Skills	Common	Restrict to system only.	Make viewable only or disable user access
Agents	Common	Restrict to system only. System partition can assign agents to any partition	Viewable, as configured for partition
Workgroups	Partition	As configured for partition.	As configured for partition
URLs	Partition	As configured for partition.	As configured for partition
Project Menus	Partition	As configured for partition.	As configured for partition
Projects	Partition	As configured for partition.	As configured for partition
Schedules	Partition	As configured for partition.	As configured for partition
Customer Priority	Partition	As configured for partition.	As configured for partition
Mail Manager	Common	Restrict to system only.	Make viewable only or disable user access
Call Blocking	Common	Restrict to system only.	Make viewable only or disable user access
Campaign	Partition	As configured for partition.	As configured for partition

Most Libraries are unique for every partition, which means that the modifications affect only the current partition. A partition administrator has full rights on a partition-owned library. The partition administrator can add, modify, or delete any library.

- Some of these libraries are available only to the system administrator. The partition administrator will either have read-only access or no access at all. The available Library selections from the Options, Libraries list are either a Common type or a Partition type:
- Common Libraries are managed through the administrators with the system partition assigned and viewable by others.
- Partition Libraries are fully manageable by administrators with the partition assigned.

Library Configuration Requirements

The following are the configuration requirements for the library:

- Library naming does not have to be unique across different partitions, which simplifies the job of the administrator in configuring and maintaining the system.

- Common Libraries are manageable by the system partition, not other partitions, when Partitions are enabled for a company, which prevents unintentional changes by the wrong administrator. To further restrict viewing, you can configure the Administrator Configuration to restrict any access.
- Partition Libraries are fully manageable by an administrator assigned to the partition when partitions are enabled, which prevents unintentional changes by the wrong administrator.

  NOTE: The Administration Configuration Option provides a workaround to mistakes, but this does not work for all options.
- Previous behavior is maintained without partitions enabled. When the Option is disabled (or when the Partition Feature is disabled), the administrator cannot see any visible difference in behavior from before. The system is returning to the system default partition.

Table 33 provides a summary of the library types, system partitions, and other partitions.

Table 33. Summary of Libraries

Library	Type	System Partition	Other Partition
Agent Statuses	Common	Restrict to system only.	Make viewable only or disable user access
Outcomes	Partition	As configured for partition.	As configured for partition
Company Prompts	Partition	As configured for partition.	As configured for partition
Data Source	Partition	As configured for partition.	As configured for partition
Display Templates	Partition	As configured for partition. These are the default templates created when the new company was created.	As configured for partition. These are the default templates created when the new partition was created.
Faxes	Partition	As configured for partition	As configured for partition.
SMTP Groups	Common	Restrict to system only	Make viewable only or disable user access.
SMTP Servers	Common	Restrict to system only	Make viewable only or disable user access
POP3 Servers	Common	Restrict to system only	Make viewable only or disable user access.
Email Acknowledgements	Partition	As configured for partition	As configured for partition.
Intelligent Email Templates	Partition	As configured for partition	As configured for partition.
Intelligent Chat Templates	Partition	As configured for partition	As configured for partition.
Dial List	Partition	As configured for partition	As configured for partition.

Table 33. Summary of Libraries

Library	Type	System Partition	Other Partition
Department	Common	Restrict to system only	Make viewable only or disable user access.
Prefix Routing Groups	Partition	As configured for partition	As configured for partition.
Prefix Routing Patterns	Partition	As configured for partition	As configured for partition.
Matching Patterns	Partition	As configured for partition	As configured for partition.
Hostname/Agent Phone Mapping	Common	Restrict to system only	Make viewable only or disable user access.
Business Events	Partition	As configured for partition	As configured for partition.
Database Connections	Common	Restrict to system only	Make viewable only or disable user access.
DNIS Library	Partition	As configured for partition	As configured for partition.
Partitions	Common	Restrict to system only	Make viewable only or disable user access.

About System Prompts

CCA uses system prompts, which are transparent for a given partition. You can configure specialized prompts using the Company Prompts Library. You can configure prompts on a partition by partition basis.

About Reports and Advanced Reports

You can configure reports to report on specific workgroups, projects, and users, which are partitioned or assigned to a specific partition. Outcomes are another partitioned library. So, you can create reports to report on Specific Partition Information. Make these Partition Reports available to partition administrators and supervisors that are assigned to the specific partitions. This requirement applies to Standard and Advanced Reports.

The administrator can simplify the configuration of partition-specific reports by showing the partitioning as it relates to the selection of data to create reports. You can generalize this feature to allow partition managers to create and execute their own reports. Let supervisors run these reports, as well.

Report Requirements

The following are the report requirements:

- Report naming does not have to be unique across different partitions, which simplifies the job of the administrator in configuring and maintaining systems.
- Standard Report configuration must present partitioned selection lists, which includes project names, workgroup names, users by workgroup, users supervised by, and outcomes. The selection list must follow the partition selected by the administrator.
- Standard Report ALL. When this report is run manually, it defaults to the partition where the report is defined. The same behavior occurs for this report if it is scheduled.
- Advanced Report selections that choose ALL report on partitioned data only (project names, workgroup names, or users, and so on) within the partition where Advanced Reports are defined. The same behavior occurs for this report if it is scheduled.
- Advanced Report selections that choose Specific present selection lists of partitioned data only (projects, workgroups, users, and supervised by).

Deleting a Partition

Deleting departed or unused partition creates a free space in the CCA database. It also ensures that an invalid partition does not appear in the AM screen.

To delete a partition

1. Click Libraries and then Partitions. The Partition main screen opens.
2. Select the partition you created, and then click Delete.

   A confirmation message appears.
3. Click OK to confirm the deletion.

Creating a Pattern Matching Group Library

A *Pattern Matching Group* is a collection of matching patterns.

CAUTION: You cannot create a Pattern Matching Group until you have created at least one Matching Pattern. See “Creating a Matching Patterns Library” on page 134 for more information.

To create a Pattern Matching Group Library

1. In the navigation pane of AM, click Libraries, Pattern Matching Groups, and then Add. The Pattern Matching Groups screen opens.

2 Use the information in the following table to complete the Pattern Matching Groups screen, and click OK:

Field	Description
Name	Type a name for this Pattern Matching Group.
Description	Type a description for this Pattern Matching Group to help identify it quickly in your Library.
Select the prefix patterns for this Group	Select the Matching Patterns to include in this group.

3 Repeat steps 1 and 2 until you have created all the Pattern Matching Groups needed for your contact center.

Deleting a Pattern Matching Group

Before deleting a Pattern Matching Group, make sure CCA is not using the group by removing the group assignment from all predictive projects.

TIP: See "Adding Predictive Calling to a Project" on page 300.

To delete a Pattern Matching Group

1 Click Libraries and then Pattern Matching Group. The Pattern Matching Group List appears.

2 Select the Pattern Matching Group you created, and then click Delete.

A confirmation message appears.

3 Click OK to confirm the deletion.

Creating a POP3 Server Library

You can create a library of POP3 Server definitions, which CCA uses to receive email traffic from customers. From this library, you can specify multiple POP3 (incoming) email servers for contact center email functions.

CCA can automatically balance email traffic loads by using your servers in a round-robin (rotating) fashion. If one server is busy handling email traffic, CCA uses the next server in the list of servers that you supply.

Select more than one POP3 server only if: When your email is sent to the email address of the project, the email server for the account will evenly distribute the email to different POP3 accounts on different hosts for load balancing. Then, CCA retrieves email from the different POP3 accounts in a round-robin fashion by the Oracle Email Distributor. For example, if the email will be distributed to different POP3 accounts (POP1, POP2, and POP3)and POP2 is busy or not responding, then the Email Distributor first checks POP1, then POP2, and then POP3. When the Email Distributor finds that POP2 is not responding, it sends an email to alarm and then checks POP3. The cycle continues, except when the Email Distributor finds POP2 is not responding a second time. After a send attempt, the Email Distributor does not send any further emails to alarm.

When you choose only one POP3 server, the email address of the project should go to the POP3 account. In this way, if a customer replies to the agent's email (which uses the email address specified in the project), the Email Distributor sends the email to the correct POP3 account.

To create a POP3 Server Library

1 In the navigation pane of AM, click Libraries, POP3 Servers, and then Add. The POP3 Servers screen (Figure 15) opens.

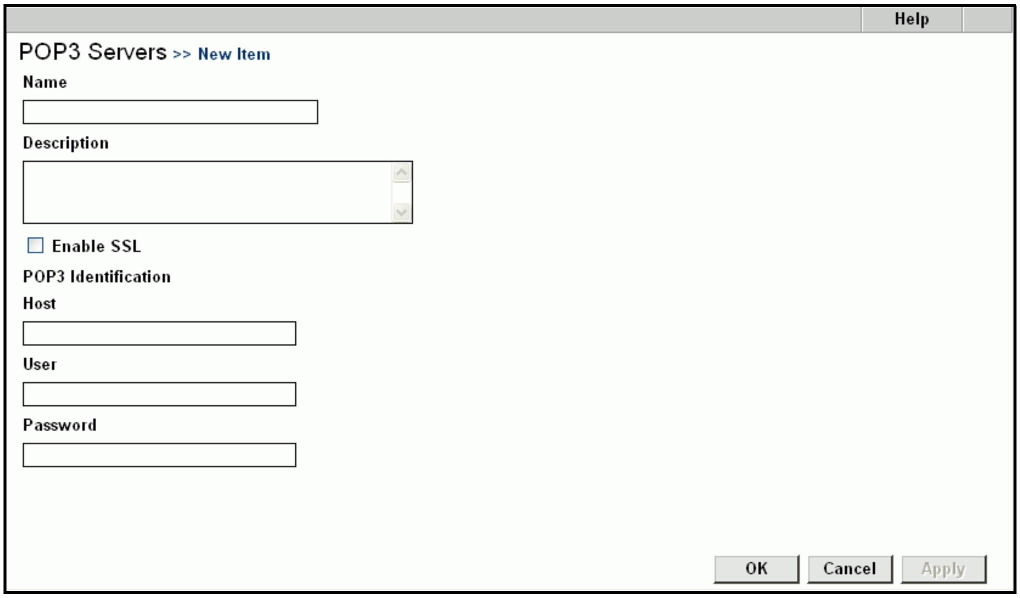


Figure 15. POP3 Servers Screen

2 Type a name for the POP3 server.

3 In the Description text box, describe the POP3 server.

4 In the Host text box, type the name of the computer hosting the server.

5 In the User text box, type a unique user name that CCA uses to log in to this POP3 server.

6 In the Password text box, type a password valid for the user name supplied in step 5, and click OK.

7 Repeat steps 1 through 6 until you have entered all of your POP3 servers.

Deleting a POP3 Server

TIP: Before deleting a POP3 Server, make sure CCA is not using the POP3 server by removing the POP3 server from Company Email Storage and all email projects. See the *Contact Center Anywhere Installation Manual*.

To delete a POP3 Server

1. Click Libraries and then POP3 Server. The POP3 main screen opens.
2. Select the POP3 Server you created, and then click Delete.

   A confirmation message appears.
3. Click OK to confirm the deletion.

Creating a Prefix Routing Group Library

A *Prefix Routing Group* is a collection of Prefix Routing Patterns. With Prefix Routing Groups, you can quickly implement strategies to route calls originating from different geographic regions to projects created specifically for handling callers from those regions.

CAUTION: You cannot create a Prefix Routing Group until you have created at least one Prefix Routing Pattern. See "Creating a Prefix Routing Pattern Library" on page 146 for more information.

To create a Prefix Routing Group Library

1. In the navigation pane of AM, click Libraries, Prefix Routing Groups, and then Add. The Prefix Routing Groups screen opens.
2. Use the information in the following table to complete the Prefix Routing Groups screen, and click OK:

Field	Description
Name	Type a name for this Prefix Routing Group. Create a name that identifies the geographic region represented by the Prefix Routing Patterns you plan to include in this group.

Field	Description
Description	Type a description for this Prefix Routing Group to help identify it quickly in your Prefix Routing Group Library.
Select the prefix patterns for this Group	Check the Prefix Routing Patterns to match against the caller's phone number. If the customer's number matches one of the checked patterns, CCA reroutes the call to the specified project. **TIP:** See "Routing Phone Interactions Based on the Caller's Number" on page 299.

3 Repeat steps 1 and 2 until you have created all the Prefix Routing Groups necessary to meet the custom routing needs of your contact center.

NOTE: Prefix Routing Groups does not appear in a phone project if there is only one phone project for the company.

Deleting a Prefix Routing Group

Before deleting a Prefix Routing Pattern Group, make sure CCA is not using the group by checking if the group assignment is removed from all Predictive projects.

TIP: See "Adding Predictive Calling to a Project" on page 300.

To delete a Prefix Routing Group

1 Click Libraries and then Prefix Routing Group. The Prefix Routing Pattern Group main screen appears.

2 Select the Prefix Routing Group you created, and then click Delete.

A confirmation message appears.

3 Click OK to confirm the deletion.

Creating a Prefix Routing Pattern Library

Predictive projects use Prefix Routing Groups to call only selected phone numbers in a Dialer List. You can route phone customers to specific areas of your contact center, based on the number from which they are calling. By creating a custom routing strategy based on the customer's phone number, you can provide services that are tailored specifically to the needs of customers from specific regions or locales.

Consider a phone project that takes callers from every state in the U.S. You must route callers from all states, except New York for example, to your standard agent pool for normal processing. Callers from New York, however, require handling by agents specially trained to process orders from New York customers.

To meet these routing requirements, you can define a Prefix Routing Pattern (such as 212*) to match all calls originating from New York numbers. Your phone project routes callers from numbers that do not match the New York number pattern to the standard agent pool, but reroutes New York callers to another project, which implements a custom routing strategy to send these callers to the appropriate agents.

To create a Prefix Routing Pattern Library

1. In the navigation pane of AM, click Libraries, Prefix Routing Patterns, and then Add. The Prefix Routing Patterns screen opens.
2. Use the information in the following table to complete the Prefix Routing Patterns screen, and click OK:

Field	Description
Name	Type a name for this pattern. Choose a name that identifies the geographical region of numbers you expect to match your pattern, or a name that identifies the purpose of this pattern.
Country	Choose a country code to match. CCA flags calls made from this country for rerouting to another project.
Pattern	Type a phone number pattern. Use the asterisk (*) wildcard character to match all digits in zero or more positions of the number. For example, type 9* to match all numbers beginning with 9, including 900-123-4567, 988-765-4321, 999-123-4567, and so on. This pattern does not match calls from 888-854-4224 or any other number that does not begin with 9. Use the question mark (?) wildcard character to match all digits in a single position of the number. For example, type 90?1234567 to match the phone number 123-4567 in all area codes beginning with 90, including 901, 902, 903, up to 909. This pattern does not match the number *910-123-4567* or any other number that does not begin with 90.
Description	Type a description to help identify it quickly in your Pattern Library.

Deleting a Prefix Routing Pattern

Before deleting a prefix routing pattern, make sure CCA is not using the pattern by removing the pattern assignment from all Prefix Routing Group.

TIP: See “Creating a Prefix Routing Group Library” on page 145.

To delete a Prefix Routing Pattern

1. Click Libraries and then Prefix Routing Pattern. The Prefix Routing Pattern main screen opens.
2. Select the Prefix Routing Pattern you created, and then click Delete.

   A confirmation message appears.

3 Click OK to confirm the deletion.

Creating an SMTP Groups Library

You can compile a library of SMTP Group definitions to identify the SMTP email servers that deliver email for your email projects.

CCA automatically balances email traffic loads by using your SMTP servers in a round-robin (rotating) fashion; that is, if one server is busy handling email traffic, CCA uses the next server in the group.

CAUTION: You must add SMTP Groups to CCA before you can create a group of SMTP Servers. If you have not created an SMTP Server Library, see “Creating an SMTP Server Library” on page 149 before creating an SMTP Group.

To create an SMTP Groups Library

1 In the navigation pane of AM, click Libraries, SMTP Groups, and then Add. The SMTP Groups screen opens.

2 In the Name text box, enter a name for the group of SMTP servers you are creating.

3 In the Description text box, describe this group of SMTP servers.

4 Check the servers to include in the group.

5 From the Importance drop-down list next to each selected server, and click OK:

- Select High to use the server to handle email transactions under normal conditions.
- Select Low to use the server only if all other servers of High importance are unavailable.

6 Repeat steps 1 through 5 until you have created all SMTP Server Groups required to handle the outgoing email for your email projects.

Deleting STMP Groups

Before deleting a SMTP Server Group, make sure CCA is not using the SMTP Group by checking the following areas:

- Remove the SMTP Group assignment from Company Email Configuration. (Select Company and then the Email Configuration tab.)

  TIP: See Chapter 5, “Adding and Editing a Company.”.

- Remove the SMTP Group assignment from all email projects. (Select Projects, the Email tab and then the SMTP Group drop-down list.)

  TIP: See “Adding Email Interactions to a Project” on page 328.

To delete STMP Groups

1 Click Libraries and then SMTP Groups. The SMTP Group main screen opens.

2. Select the SMTP Group you created, and then click Delete.

   A confirmation message appears.

3. Click OK to confirm the deletion.

Creating an SMTP Server Library

You can compile a library of SMTP Server definitions, which CCA uses to send email traffic from agents to customers. From this library, you can specify multiple SMTP (outgoing) email servers for contact center email functions.

CCA automatically balances email traffic loads by using your servers in a round-robin (rotating) fashion; that is, if one server is busy handling email traffic, CCA uses the next server in the list of servers that you supply.

To create an SMTP Server Library

1. In the navigation pane of AM, click Libraries, SMTP Servers, and then Add. The SMTP Servers screen opens.
2. Enter a Name for the SMTP server.
3. In the Description text box, describe this SMTP server.
4. In the Host text box, enter the name of the computer hosting the server.
5. In the Domain text box, enter the network domain where this server resides, and click OK.

   NOTE: Depending upon what type of SMTP server you are using, if authentication is turned off on the SMTP server, and you do not enter anything in the Domain text box, a connection error might occur. This will prevent any emails, faxes, or voicemails, from being successfully sent. When this happens, all emails, faxes, and voicemails end up in the Mail Manager. See your network manager for more information.

6. Repeat steps 1 through 5 until you have entered all of your SMTP servers.

Deleting an SMTP Server Library

Before deleting a SMTP Server, make sure CCA is not using the SMTP by checking if the SMTP is removed out of all SMTP Group.

TIP: See Step 4 on page 148 in “Creating an SMTP Groups Library.”

To delete an SMTP Server Library

1. Click Libraries and then SMTP Server. The SMTP Server main screen opens.
2. Select the SMTP Server you created, and then click Delete.

   A confirmation message appears.

3 Click OK to confirm the deletion.

Creating a URL Library

You can compile a library of Uniform Resource Locators (URLs) or Web pages, containing content that agents can use when assisting customers.

To create a URL Library

1. In the navigation pane of AM, click Libraries, URL, and then Add. The Add URL screen opens.
2. In the URL Name text box, enter the name of the first URL from question 13 of *Administrator's Planning Survey*.

   TIP: See "Question 13: Will Your Agents Read Prepared Scripts?" on page 32.

3. In the Description text box, describe the purpose or contents of this URL.
4. In the URL text box, enter the URL address.
5. Click View to preview the contents of the URL.
6. Select all the applications that this URL will serve. See the following table for definitions of each different type of URL application.

URL Application	Description
FAQ	Select this option to make the content of this URL available to agents providing a service to customers reaching the contact center by phone, chat, email, or the Internet. The suggested content for an FAQ URL is a list of approved responses to your customer's most frequently asked questions.
Chat Push Page	Select this option to make the content of this URL available to agents handling chat customers, or to make this URL available for automatically displaying the content to a chat customer waiting for an agent. Agents can quickly direct chat-based customers to a Web page by sending them a Chat Push URL.
Web Callback	Select this option to make the content of this URL available to agents handling Web callback interactions.
Intelligent Email	Select this option to make the content of this URL available to an agent who is using the suggested customer response option. (CCA supplies a suggested customer response based on the automatic text analysis of the customer's email message.)

URL Application	Description
Intelligent Chat	Select this option to make the content of this URL available to an agent who is using the suggested customer response option. (CCA supplies a suggested customer response, based on the automatic text analysis of the customer's chat message.)
Script	Select this option to make the content of this script URL available to the agents providing a service to customers reaching the contact center by phone, chat, email, or the Internet. The script URL, for example, can open a company-approved script that agents read to customers to introduce a product or service consistently.

7. If you selected the Script box in step 6, enter an opening script in the large text box, and click OK. The opening script displays in the Opening Script area of the agent's Interaction Manager (IM) screen. The agent can then click Load Script to view the content specified in the script URL.
8. Repeat steps 1 through 7, as many times as you need, to enter all of your URLs.

Deleting a URL Library

Deleting departed or unused URL creates a free space in the CCA database. It also ensures that an invalid URL will not appear in the AM screens.

- Before deleting a URL, make sure CCA is not using the URL by checking the following areas:
- Remove the URL assignment from all projects.

  TIP: See Chapter 15, "Creating Projects."
- Remove the URL assignment from all Intelligent Email.

  TIP: See "Creating an Intelligent Email Template Library" on page 129.
- Remove the URL assignment from all Intelligent Chat.

  TIP: See "Creating an Intelligent Chat Template Library" on page 128.

To delete a URL Library

1. Click Options and then URL. The URL main screen opens.
2. Select the URL you created, and then click Delete.

   A confirmation message appears.
3. Click OK to confirm the deletion.

7 Customizing Prompts

This chapter describes how to customize your own greetings and prompts for touch-tone menus. It includes the following topics:

About Prompts

You create your own custom greetings and prompts for the touch-tone menus callers use to navigate your contact center. You can also customize the prompts that CCA provides to match your business practices. You can:

- Record, save, and implement prompt files
- Customize the system greetings and messages CCA provides

Prompts are sound recordings (in .wav file format) that CCA plays to greet and inform callers dialing into your company. CCA uses two types of prompts:

- **System Prompts**. Prompts that CCA supplies to support core CCA features.
- **Custom Company Prompts.** Prompts that you create to support contact center features that are unique to your company (such as touch-tone menus or workgroup greetings).

Each prompt type also has rules that CCA uses to determine which prompt to play in different situations.

Overview of System Prompts

System prompts are general purpose prompts, which are not necessarily unique to a specific contact center company, project or workgroup. CCA provides a set of system prompts, which were recorded using a female voice. You can use these supplied system prompts in your contact center with no customization. You can also customize any editable system prompt to meet the specific needs of your contact center (by using a different voice, changing the wording, and so on). CCA divides the system prompts into the following logical groups, based on how CCA uses them:

- Contact center prompts
- Date and time prompts
- Number prompts
- Agent voicemail prompts
- Company directory navigation prompts
- Project option prompts
- Workgroup option prompts
- Call blocking prompts

For a list of the prompts in each group, see “About Grouping Prompts by Application” on page 162. For a complete list of the supplied system prompts, see “Listing All Prompts by Filename” on page 173.

Overview of Custom Company Prompts

Custom Company Prompts are prompts you create to greet callers who dial in to a project. They describe the touch-tone menus and other options so that callers can navigate to the contact center. Therefore, a Custom Company Prompt is any prompt that describes a unique characteristic of your contact center, including:

- Greetings identifying the company name or the workgroup name
- Menus for navigating to workgroups in the company
- Menus for navigating to specific agents in the company

NOTE: Before you can use Custom Prompts in CCA, you must record the prompts and save them in the Prompt Library.

For more information on adding the prompts to the Company Prompt Library, see “Creating a Company Prompt Library” on page 92.

Process of Creating a Custom Prompt

Custom Prompts can replace a supplied System Prompt or you can add them to the Company Prompt Library. You can then use any Custom Prompt from the library with any customized CCA features (such as touch-tone menus, workgroup greetings, and so on).

To create a custom prompt for your contact center, you must:

- Plan the prompt.
- Record the prompt.
- Save the prompt.

Planning the Prompt

Before recording the prompt, make sure you understand how CCA uses it in the contact center. Make sure you know:

- If your prompt replaces a CCA System Prompt. For more information on system prompts, see "Customizing System Prompts" on page 158.
- If your prompt supports options and touch-tone menus created specifically for the contact center's projects and workgroups. For more information on a company prompt library, see "Creating a Company Prompt Library" on page 92.
- The name for the prompt, as it appears in the CCA Company Prompt Library or in the CCA System Prompts.
- The keypresses (tones) the caller can enter in response to the prompt if the prompt describes a touch-tone menu. For more information on standard menus, see "Creating Standard Menus" on page 220.
- The action CCA takes in response to each tone.
- The text for the prompt, including the text describing both the keypress and the action (such as *Press one to reach Sales)*.
- The name of the prompt file.

Recording the Prompt

Follow these guidelines:

- Use a high-quality sound recording software package (such as Adobe Audition™, GoldWave Inc.'s GoldWave™, and so on) when recording new prompts.
- Use a high-quality microphone and sound card to produce the highest quality recordings.

Saving the Prompt

To ensure compatibility with CCA, save your prompt recording to a file on your hard disk or network with the following characteristics:

Soft switch installation:

Format:	CCITT uLAW
Sampling Rate:	8,000 Khz (800 Mhz)

Resolution:	8 bits
Channels:	1 (mono)

Dialogic installation:

Format:	Windows PCM
Sampling Rate:	8 Khz
Resolution:	8 bits
Channels:	1 (mono)

NOTE: In Solaris, the MP3 Server converts the Mulaw files to PCM before converting .wav files to MP3.

Process of Setting Up a Music Broadcast

Customers can be put on hold in different ways. In addition, while a customer is waiting on hold, you can configure the system to play audio to them:

- Customers can be on hold while they wait in a workgroup queue. While they wait, you can play a hold prompt.

  TIP: See “Select Prompts for this workgroup” on page 209 for more information.

- After a customer has been connected to an agent, the agent can put the customer hold. While the customer waits, you can play a prompt or streaming audio (music broadcast).

  TIP: See “Play Audio on Hold Using” on page 293 to learn how to play a prompt to a customer who was put on hold by an agent.

Playing Streaming Audio (Music Broadcast)

To play streaming audio for a caller on hold you must have a PC or some other sound player device that can:

- Play music continuously.
- Make a SIP call to the machine where your music server resource is running.

Use Network Manager to create a Music Server resource. The Music Server receives the audio stream from your player device and rebroadcasts it.

To play streaming audio

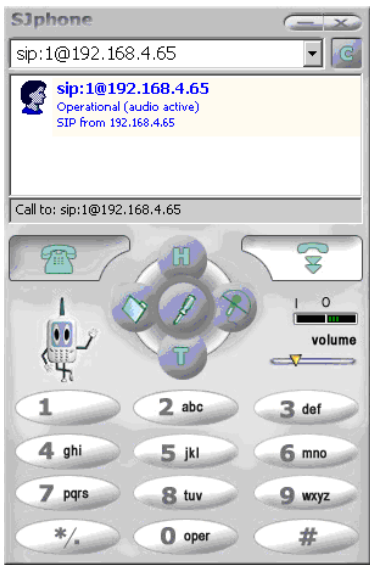
1. Start Network Manager and view by host.
2. Add a new resource. The New Server dialog box appears.
3. Complete the fields in the Add New Server dialog box.
4. Click the Advanced button. The Music Server dialog box appears.

5 Complete the fields in the Music Server dialog box.

NOTE: In this example, you configure the Music Server to receive and broadcast 10 different audio streams (Max Music Channel). For example, use one channel for jazz, another for pop music, and so on.

6 Configure the sound player device. If you use a PC as the audio streaming device, you can put a CD of music in the machine, and run an audio player software in repeat mode.

7 You also must configure your PC so that it makes a SIP call to the Music Server resource you created in the previous step. A simple way is to install a software phone on your PC. For this example, use SJPhone.



a The syntax of the SIP call is:

sip:<*Channel Number*>@<*IP address you entered in the Music Server dialog box*>

For example: `SIP:1@192.168.4.65`

b You can enter any number as the channel number, as long as you do not use that channel number for any other audio stream.

In this example, you configure the Music Server resource for a maximum of 10 audio streams. So, theoretically, you can set up 10 boxes that make 10 SIP calls, with 10 unique channel numbers, which send 10 different audio streams to the Music Server

8 Configure Administration Manager (AM):

a Log in to Administration Manager as a Netadmin.

b View the list of companies.

c In the Go To... menu, select Music Broadcast, then click Add.

d In the Music Broadcast screen, type a name, description, and a SIP URL.

The name and description can be anything, but the SIP URL must use this syntax:

`sip:CH`<*channel number from SIP phone*>`@`<*IP address you entered in the Music Server dialog box*>

For example: `sip:CH1@192.168.4.65`

- The channel number must match what you entered in the SJPhone.
- The channel number must be uppercase.
- The IP address is what you entered in the Music Server dialog box in Network Manager.

9 Go back to the list of companies (Go To, List of Companies), and select a company.

10 Go to Options, Projects, General tab, click Play Audio on Hold Using, and select the Music Broadcast button. The Music Broadcast entry you created appears in the list box.

You can also select a Music Broadcast in a campaign.

Customizing System Prompts

Customize the CCA System Prompts to meet the contact center needs by modifying the voice, language, or text:

To customize system prompts

1 Plan, record, and save the prompt file to replace the system prompt.

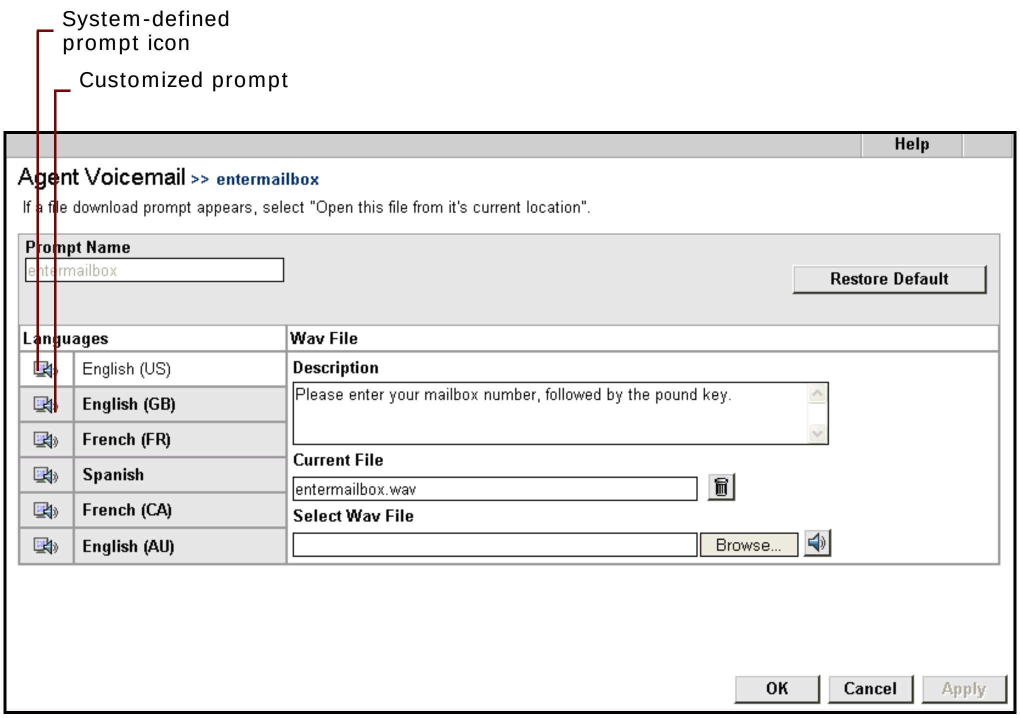
TIP: See "Process of Creating a Custom Prompt" on page 154.

2 Click System Prompts, and then click the group to customize.

TIP: To view a list of prompts in each group, see "About Grouping Prompts by Application" on page 162.

For example, to customize a prompt in the Agent Voicemail group, click System Prompts, and then click Agent Voicemail. CCA displays the list of prompts for the group you chose.

3 From the list of prompts, click the prompt to customize, and then click Edit. The Edit (customize) System Prompt screen appears.



4 Click the language in which you recorded your prompt.

5 In the Description text box, type a description of the prompt. This description appears in the prompt list after setting AM to the language supported by this prompt.

6 Enter the filename and path to the prompt in step 1 (or click Browse, and choose the file from your computer or network).

7 Click the sound icon to listen to the recording to verify that it is correct (or click Delete to cancel all changes and return to the Prompt list).

8 Repeat steps 4 through 7 for each language for which you recorded a prompt, and click OK.

CCA stores the new prompt in the CCA database and plays it for callers (or agents), as necessary.

CAUTION: If you modify only one or a few of the system prompts, but leave the others in the default condition (female, business-friendly voice), your customers might hear mixed prompts.

NOTE: For consistency across all prompts, consider customizing all system prompts in each language using the same speaker or using the system prompts as provided with CCA.

Example: Creating Prompts for Jay's Unicycle Company

In this example, the CCA administrator for Jay's Unicycle Company creates a project called *Sales*, which contains two workgroups: *English* and *Spanish* for handling English-speaking customers and Spanish-speaking customers, respectively. The following sections describe the steps an administrator must perform to create or customize prompts to route callers to the appropriate workgroup.

NOTE: For illustration, some of the steps in this example refer to AM features discussed in later chapters of this guide. These chapters discuss how to set up projects and workgroups that use prompts recorded earlier using the procedures discussed in this chapter.

TIP: See "Creating a Company Prompt for Routing to a Workgroup."

Creating a Company Prompt for Routing to a Workgroup

As callers dial in to Jay's Unicycle Sales phone project, the administrator wants to play a prompt giving the caller the option to be routed to either the Spanish-speaking workgroup or to the English (U.S.)-speaking workgroup. The administrator performs the following steps to accomplish this routing task.

To create a company prompt for routing to a workgroup

1. Records and saves the following prompt, describing the caller's language choices, to the local hard disk:

   Thank you for calling Jay's Unicycles Sales Department! Press one for English. Presione el dos para español.

   TIP: See "Process of Creating a Custom Prompt" on page 154.

2. Adds the prompt file to the Company Prompt Library under the name, Choose Workgroup.

   TIP: See "Creating a Company Prompt Library" on page 92.

3. Because this prompt determines the language of the caller, the administrator must place this prompt in the default language for the project, which in this example is English (U.S.).

4. Creates a touch-tone menu that plays the *Choose Workgroup* prompt recorded in Step 1 and defines the actions to take when the caller presses one or two.

   TIP: See "Creating Standard Menus" on page 220.

5. Creates a phone project to route the caller to the *Choose Workgroup* menu defined in step 3.

   TIP: See "Process of Adding Phone Interactions to a Project" on page 294.

   In this case, each response routes the caller to a second menu, which plays another prompt describing the menu choices for routing to a specific agent within that workgroup.

   TIP: See "Example of Creating a Prompt for Routing to a Specific Agent Within a Workgroup".

Example of Creating a Prompt for Routing to a Specific Agent Within a Workgroup

In this example, assume the caller reaching the project selects option 1 (English-speaking Workgroup) from the *Choose Workgroup* menu. The project routes the caller directly to the English (US) Workgroup, where the caller waits in a queue for the next available agent in the workgroup.

For example, assume the administrator wants to allow the caller to reach a specific agent in the workgroup. To do this, the administrator must route the caller to a second menu, which describes the direct-to-agent routing options within the English (US) workgroup. The caller can choose from this menu to be connected to a specific agent in the workgroup.

The administrator performs the following steps to accomplish this routing task.

To create a prompt for routing to a specific agent within a workgroup

1 Records and saves the following prompt to the local hard disk:

You have reached Jay's Unicycles Sales Department. Press one for Ashley. Press two for Fred. Press three for Tom. Press four for Scott. Press nine to repeat this menu.

TIP: See "Process of Creating a Custom Prompt" on page 154.

2 Adds the prompt file to the Company Prompt Library under the name *Choose Agent*.

TIP: See "Creating a Company Prompt Library" on page 92.

Because the caller selected English as the language, the administrator specifies a wave file recorded in U.S. English for the Choose Agent prompt. If, however, the administrator wants to create a menu that allows Spanish speaking callers to choose to be routed to a specific agent, the administrator must specify a wave file recorded in Spanish for the *Choose Agent* prompt.

3 Creates a touch-tone menu that plays the *Choose Agent* prompt recorded in Step 1 and defines the actions to take when the caller presses each valid key.

TIP: See "Creating Standard Menus" on page 220.

About Customizing a System Prompt

When CCA routes callers to a workgroup, the caller hears the System Workgroup Option Prompts.

TIP: For a list of these prompts, see "Workgroup Option Prompts" on page 168.

If the administrator does not customize these prompts, the caller hears CCA's default recording (business-friendly, female voice) in the default language for the project.

In this example, assume the administrator wants to change the default Workgroup Option Prompts to match the voice used to create the menu prompts in the Company Prompt Library. The first prompt customized is the Play Estimated Wait Time prompt.

TIP: See "Play estimated wait time" on page 207.

The administrator changes the *Play Estimated Wait Time* prompt from a female voice speaking the default text *your estimated wait time is...,* to a male voice speaking slightly different text to match the conventions used in the company.

Customizing a System Prompt

The administrator performs the following steps to customize the prompt.

To customize a system prompt

1. Records and saves the following prompt to the local hard disk or network:

   A representative will be available in approximately...

   TIP: See "Process of Creating a Custom Prompt" on page 154.

2. Replaces the English (U.S.) version of the *Estimated Wait Time* Workgroup Option System prompt with the new prompt created in Step 1. CCA plays the customized prompt for all callers reaching the workgroup.

   TIP: See "Customizing System Prompts" on page 158.

Restoring System Prompts

After customizing a system prompt, you can restore it to the original prompt later, if conditions change.

To restore system prompts

1. Click the System Prompt group containing the prompt that you want to restore. For example, to restore a prompt in the Agent Voicemail group, click Agent Voicemail.

   CCA displays the list of prompts for the group that you can choose from. Prompts that are available to restore are identifiable by the absence of a bullet in the System Defined column of the list.

2. Select the prompt to restore, and click Edit.
3. Click the Restore Defaults button.

   CCA restores the original system prompt in all languages, indicated by a bullet in the System Defined column of the prompt list.

About Grouping Prompts by Application

The following sections provide all the CCA prompts within the contact center environment, grouped by application or purpose.

Contact Center Prompts

Contact Center Prompts (Table 34) are sounds or messages CCA plays to callers or agents attempting to make calls to or from the system. There are 64 contact center prompts.

Date and Time Prompts

CCA uses Date and Time Prompts (Table 34) to build messages requiring a date or a timestamp (such as those CCA plays for agents retrieving their voicemail messages).

Table 34. Date and Time Prompts

Filename (.wav)	Default Recording	Default Application
am	"a.m."	Message timestamp.
april	"April"	Message timestamp.
august	"August"	Message timestamp.
day01 - day31	"First" through "Thirty-first"	Message timestamp.
december	"December"	Message timestamp.
february	"February"	Message timestamp.
january	"January"	Message timestamp.
july	"July"	Message timestamp.
june	"June"	Message timestamp.
march	"March"	Message timestamp.
may	"May"	Message timestamp.
november	"November"	Message timestamp.
october	"October"	Message timestamp.
pm	"p.m."	Message timestamp.
september	"September"	Message timestamp.

Number Prompts

CCA uses Number Prompts (Table 35), the digits from zero (pronounced as “oh”) through 99 (pronounced as “ninety-nine”) to build any greeting or message requiring a number.

Table 35. Number Prompts

Number or Point	Spoken Number or Point
0 - 99	“oh” through “ninety-nine”
point	point

Agent Voicemail Prompts

CCA plays Agent Voicemail Prompts (Table 36) for agents when they are setting up or retrieving their voicemail messages. With the exception of *goodafternoon*, *goodevening*, and *goodmorning*, callers do not hear these prompts.

Table 36. Agent Voicemail Prompts

Filename (.wav)	Default Recording	Default Application
at	“at.”	Agent voicemail retrieval
entermailbox	“Please enter your mailbox number, followed by the pound key.”	Agent voicemail retrieval
enterpassword	“Please enter your password, followed by the pound key.”	Agent voicemail retrieval
goodafternoon	“Good Afternoon.”	Agent voicemail retrieval
goodevening	“Good Evening”	Agent voicemail retrieval
goodmorning	“Good Morning.”	Agent voicemail retrieval
hearddeletedmsg	“You have heard all of your deleted messages.”	Agent voicemail retrieval
heardnewmsg	“You have heard all of your new messages.”	Agent voicemail retrieval
heardsavedmsg	“You have heard all of your saved messages.”	Agent voicemail retrieval
hundred	“hundred.”	Agent voicemail retrieval
invalidmp	“The password you entered does not match the mailbox you selected.”	Agent voicemail retrieval
listennewarcvm	“Press 1 to listen to your new voicemail messages, press 2 to listen to your saved voicemail messages, press star to return to the main menu.”	Agent voicemail retrieval

Table 36. Agent Voicemail Prompts

Filename (.wav)	Default Recording	Default Application
listennewarvm_2	"Press 1 to listen to your new Voicemail messages, press 2 to listen to your saved Voicemail messages, press 3 to review your deleted Voicemail messages."	Agent voicemail retrieval
listenvoicemailmenu	"To repeat this voicemail, press 1. To save this voicemail, press 2. To delete this voicemail, press 3. To log out, press 4."	Agent voicemail retrieval
mailboxmainmenu	"Press 1 to retrieve your voicemail messages, faxes and emails, press 2 to record or rerecord your voicemail greeting, press 9 to repeat these choices"	Agent voicemail retrieval
mailserverdown	"The system is unable to connect you to the mail server, you may continue into the system and do anything you would ordinarily do except receive voicemail messages."	Agent voicemail retrieval
msgdeleted	"Message deleted."	Agent voicemail retrieval
msgkeepedasnew	"Message kept as new."	Agent voicemail retrieval
msgreceivedon	"Message received on."	Agent voicemail retrieval
msgsaved	"Message saved."	Agent voicemail retrieval
msgsaved_2	"Message saved."	Agent voicemail retrieval
msgsent	"Message sent."	Agent voicemail retrieval
newacdvoicemailmenu	"You have a new ACD voicemail. To listen to this voicemail, press 1. To decline this voicemail and log out, press 2."	Agent voicemail retrieval
newmessage	"New message."	Agent voicemail retrieval
newmessages	"New messages."	Agent voicemail retrieval
nodeletedmessages	"You have no deleted messages."	Agent voicemail retrieval
nomessages	"You have no messages in your mail box."	Agent voicemail retrieval
nonewmessages	"You have no new messages."	Agent voicemail retrieval
nosavedmessages	"You have no saved messages"	Agent voicemail retrieval
pleasehold	"Please hold while we connect you to the Mail Server."	Agent voicemail retrieval
replymailmenu	"To repeat this message, press 2. To save this message, press 3. To delete this message, press 4. To return to the main menu, press star. To repeat these choices, press 9."	Agent voicemail retrieval

Table 36. Agent Voicemail Prompts

Filename (.wav)	Default Recording	Default Application
replymailmenu_2	"To repeat this message, press 2. To keep this message as new, press 3. To delete this message, press 4. To save this message press 4. To send a copy of this message to your email address press 6. To return to the main menu, press star. To repeat these choices press 9."	Agent voicemail retrieval
savedmessage	"Saved message."	Agent voicemail retrieval
savedmessages	"Saved messages."	Agent voicemail retrieval
selectgreeting	"To listen to your busy message press 1, to record or rerecord your busy message press 2, to listen to your recorded name press 7, to record or rerecord your recorded name press 8, to repeat these choices press 9, to return to the main menu press star."	Agent voicemail setup
thousand	"Thousand."	Agent voicemail retrieval
unknowndate	"The system is not able to retrieve the date and time of this message."	Agent voicemail retrieval
youHave	"You have."	Agent voicemail retrieval

Company Directory Navigation Prompts

CCA plays Company Directory Navigation Prompts (Table 37) for callers who reach a project, which has a menu option allowing the caller to reach an agent by choosing from a company directory.

TIP: For instructions on creating this menu, see "Company Directory" on page 224.

Table 37. Company Directory Prompts

Filename (.wav)	Default Recording
entername	"Please enter the last name of the person you wish to reach using your touch-tone telephone keypad. For the letter "Q", use the number seven. For the letter "Z", use the number 9."
extnumber	"Extension number."
nopeople	"There are no names that match your selection"
select	"Press any key when you hear the name of the person you wish to reach."
selectdir	"People matching your selection."

Table 37. Company Directory Prompts

Filename (.wav)	Default Recording
thereare	“There are “
transferto	“Please hold while I transfer you to “

Project Option Prompts

CCA plays Project Option Prompts (Table 38) only if the caller reaches a project with the following options:

- Follow Me Forwarding

  TIP: See “Enable Follow Me” on page 298.

- Ask for Customer ID

  TIP: See Use Prompt to ask for customer ID on page 296.

- Validate Phone Number

  TIP: See “Validate phone number” on page 295.

Table 38. Project Option Prompts

Filename (.wav)	Default Recording	A Project With This Option Can...
customeridentered	“The customer id number you entered is”	Ask for customer ID
customeridnum	“Please enter your customer id number followed by the pound key.” **TIP:** See“Use Prompt to ask for customer ID” on page 296 for information on replacing this prompt with a prompt from your Prompt Library.	Ask for customer ID
_welcome	“Hello, and thank you for calling.”	Ask for customer ID and Validate phone number on page 295.
anotherlocation	“To try to reach this person at another location, press one. To send this person a voicemail message, press two.” **TIP:** See “Enable Follow Me” on page 298.	Enable Follow Me (played for *Customer* if agent does not answer primary extension and Follow Me is enabled)
clientnumconfirm	“If this is correct, press one. If this is not correct, press two.”	Validate phone number on page 295

Table 38. Project Option Prompts

Filename (.wav)	Default Recording	A Project With This Option Can...
entertelno	"Please enter your area code and telephone number followed by the pound key."	Validate phone number on page 295
goodbye	"Goodbye, and thank you for calling."	Validate phone number on page 295, Use Prompt to ask for customer ID on page 296, enable Workgroup option Allow customer to leave a voicemail on page 208, and after input failure to agent voicemail menus.
thankyou	"Thank you."	Validate phone number on page 295 and Use Prompt to ask for customer ID on page 296.
verification	"If this is correct, press 1. If this is not correct, press 2."	Use Prompt to ask for customer ID on page 296.

Workgroup Option Prompts

CCA plays Workgroup Option Prompts (Table 39) for those callers that have entered or are waiting in a workgroup queue for the next available agent.

CAUTION: If a workgroup option is listed for a prompt, then CCA plays that prompt only if the indicated workgroup option is enabled in the AM Workgroups screen.

TIP: See "Creating a Workgroup" on page 202.

Table 39. Workgroup Option Prompts

Filename (.wav)	Default	Workgroups With These Options Can...
acdcallback	"Press 2 to enter your telephone number and receive a callback. Your priority status in the queue will be preserved"	Allow customer to request a callback on page 207.
acdentercountrycode	"Please enter your country code followed by the pound key."	Allow customer to request a callback on page 207.
acdentertelno	"Please enter your area code and telephone number followed by the pound key."	Allow customer to request a callback on page 207.

Table 39. Workgroup Option Prompts

Filename (.wav)	Default	Workgroups With These Options Can...
acdgoodbye	"You will receive a callback as soon as a representative has become available. Please make sure your telephone line is free to receive the call. Thank you, and goodbye."	Allow customer to request a callback on page 207.
acdintro	"All agents are currently busy with other callers. Please continue to hold to maintain your priority sequence. This call may be monitored for quality assurance purposes."	Select Prompts for this workgroup on page 209. This also describes how to replace this prompt with a prompt from your Prompt Library.
acdmenu	"At any time while you are on hold, you may choose among the following options, or, continue to hold for the next available agent."	Allow customer to request a callback on page 207 and Allow customer to leave a voicemail on page 208.
acdnewmenu	"for more options, press 3"	Route to Project Menu on page 206.
acdrepeat	"Your call is very important to us. Please hold for the next available Agent. All calls are answered in the order in which they are received."	Select Prompts for this workgroup on page 209. This also describes how to replace this prompt with a prompt from your Prompt Library.
acdrepeatmenu	"Press 9 to repeat this menu."	Play if either of Allow customer to request a callback or Allow customer to leave a Voice Mail is checked. See Select Prompts for this workgroup on page 209.
acdring	Two minutes and nineteen seconds of ringing (25 rings)	Select Prompts for this workgroup on page 209. This also describes how to replace this prompt with a prompt from your Prompt Library.
acdvoicemail	"Press 1 to leave a voicemail message"	Allow customer to leave a voicemail on page 208.
acdwaitestimate	"Your estimated wait time is"	Play estimated wait time on page 207.
acdwaitminute	"minute"	
acdwaitminutes	"minutes"	

Table 39. Workgroup Option Prompts

Filename (.wav)	Default	Workgroups With These Options Can...
countrycodeenter	“The country code you entered is”	Allow customer to request a callback on page 207.
invalid	“Invalid entry”	
invalidpasscode		
music	Fifty-six seconds of prerecorded music.	Select Prompts for this workgroup on page 209. This also describes how to replace this prompt with a prompt from your Prompt Library.
numconfirm	“If this is correct, press one. To re-enter, press two. To cancel and continue to hold, press three.”	Allow customer to request a callback on page 207.
numenter	“The number you entered is”	Allow customer to request a callback on page 207.
recordmenu	“To rerecord your message, press one. To listen to your message, press two. To send your message, press three. To cancel and continue, press seven.”	Allow customer to request a callback on page 207.
recordmsg	“Please record your message at the tone. When you are finished, press the pound key.”	Allow customer to leave a voicemail on page 208.

Ordering of Workgroup Prompts

The order in which CCA plays workgroup prompts can be affected by these features:

- Allow customer to leave a voicemail
- Allow customer to request a callback

NOTE: Both features and the process of selecting workgroup prompts, are described beginning on page “Setting Workgroup Options” on page 206.

Order of Workgroup Prompts When Not Using Leave Voicemail or Request Callback

If you are not using either the leave voicemail or request callback feature, and you are using the default system prompts, CCA plays workgroup prompts in the order shown in Table 40.

Table 40. Order of Workgroup Prompts When Not Using Voicemail or Request Callback

Prompt	Default File	Description
Intro Prompt	acdintro	“All agents are currently busy with other callers. Please continue to hold to maintain your priority sequence. This call may be monitored for quality assurance purposes.”
Music Prompt	music	Fifty-six seconds of prerecorded music.
Hold Prompt	acdrepeat	“Your call is very important to us. Please hold for the next available Agent. All calls are answered in the order in which they are received.”

After CCA plays the hold prompt, the customer hears a music prompt or hold prompt loop until an agent becomes available or until the customer hangs up.

Order of Workgroup Prompts When Using Leave Voicemail or Request Callback

If you are using either leave voicemail or request callback feature, CCA plays workgroup prompts play in the order shown in Table 41.

Table 41. Order of Workgroup Prompts When Using Voicemail or Request Callback

Prompt	Default File	Description of Workgroup Prompts
Intro Prompt	acdintro	“All agents are currently busy with other callers. Please continue to hold to maintain your priority sequence. This call may be monitored for quality assurance purposes.”
Music Prompt	music	Fifty-six seconds of prerecorded music.
ACD Menu Prompt	acdmenu	“At any time while you are on hold, you may choose among the following options, or, continue to hold for the next available Agent.”
ACD Voicemail Prompt	acdvoicemail	“Press one to leave a voicemail message.” **NOTE:** This plays if Allow customer to leave a voicemail is enabled.

Table 41. Order of Workgroup Prompts When Using Voicemail or Request Callback

Prompt	Default File	Description of Workgroup Prompts
ACD Callback Prompt	acdcallback	"Press two to enter your telephone number and receive a callback. Your priority status in the queue will be preserved." **NOTE:** This plays if "Allow customer to request a callback" is enabled.
ACD Repeat Menu	acdrepeatmenu	"Press nine to repeat this menu."
Hold Prompt	acdrepeat	"Your call is very important to us. Please hold for the next available Agent. All calls are answered in the order in which they are received."

After playing the Hold prompt, CCA loops (starting with the music) until an agent becomes available or until the customer hangs up.

Call Blocking Prompts

CCA plays the Call Blocking prompts (Table 42) when a customer or agent attempts to enter a number that matches a number pattern labeled as blocked. For more information on creating a call blocking list, see "Creating a Call Blocking List" on page 359.

For example, if a customer requesting a callback enters a blocked number, CCA plays a prompt notifying them that the callback cannot be completed. If an agent attempts to transfer a call to a number identified as blocked, CCA plays a prompt to notify the agent that the transfer cannot be completed.

Table 42. Call Blocking Prompts

Filename (.wav)	Default Recording	Default Application
countryblocked	"We are sorry, the country code you entered cannot be dialed from our system."	Call blocking
numberblocked	"We are sorry, the number you entered cannot be dialed from our system."	Call blocking

Listing All Prompts by Filename

Table 43 lists all supplied CCA prompts, sorted by filename.

Table 43. CCA System Prompts Sorted by File Name

Filename (.wav)	Default Recording	Default Application Location
0 - 99	"oh" through "ninety-nine"	Project option "Ask for customer ID." Workgroup option: Play estimated wait time on page 207, "Validate Phone Number," and Company Directory Navigation."
_welcome	"Hello, and thank you for calling."	Project options Use Prompt to ask for customer ID on page 296 and "Validate Phone Number."
acdcallback	"Press two to enter your telephone number and receive a callback. Your priority status in the queue will be preserved"	Workgroup option Allow customer to request a callback on page 207.
acdentercountrycode	"Please enter your country code followed by the pound key."	Workgroup option Allow customer to request a callback on page 207.
acdentertelno	"Please enter your area code and telephone number followed by the pound key."	Workgroup option Allow customer to request a callback on page 207.
acdgoodbye	"You will receive a callback as soon as a representative has become available. Please make sure your telephone line is free to receive the call. Thank you, and goodbye."	Workgroup option Allow customer to request a callback on page 207.
acdintro	"All agents are currently busy with other callers. Please continue to hold to maintain your priority sequence. This call may be monitored for quality assurance purposes."	"Select Prompts for this workgroup" on page 209. Also describes how to replace this prompt with a prompt from your Prompt Library.
acdmenu	"At any time while you are on hold, you may choose among the following options, or, continue to hold for the next available Agent."	Workgroup options Allow customer to leave a voicemail on page 208 and Allow customer to request a callback on page 207.

Table 43. CCA System Prompts Sorted by File Name

Filename (.wav)	Default Recording	Default Application Location
acdrepeat	"Your call is very important to us. Please hold for the next available Agent. All calls are answered in the order in which they are received."	Workgroup option "Hold prompt."
acdrepeatmenu	"Press nine to repeat this menu."	Workgroup options Allow customer to request a callback on page 207 and Allow customer to leave a voicemail on page 208
acdring	Two minutes and nineteen seconds of ringing (25 rings)	Workgroup option "Select Prompts for this workgroup" on page 209. Also describes how to replace this prompt with a prompt from your Prompt Library.
acdvoicemail	"Press one to leave a voicemail message."	Workgroup option Allow customer to leave a voicemail on page 208.
acdwaitestimate	"Your estimated wait time is "	Workgroup option "Play Estimated Wait Time."
acdwaitminute	"Minute."	Workgroup option "Play Estimated Wait Time."
acdwaitminutes	"Minutes."	Workgroup option "Play Estimated Wait Time."
am	"a.m."	Date and Time
anotherlocation	"To try to reach this person at another location, press one. To send this person a voicemail message, press two." **TIP:** See "Enable Follow Me" on page 298.	Project option: "Follow Me" (played for *Customer* if agent does not answer primary extension and Follow Me is enabled)
april	"April"	Date and Time
at	"at"	Agent voicemail retrieval
august	"August"	Date and Time
badext	"Invalid extension"	Played for customers who dial an extension that has not been assigned.

Table 43. CCA System Prompts Sorted by File Name

Filename (.wav)	Default Recording	Default Application Location
busytone	Eight seconds of busy tone (eight tones)	Played for agents to indicate a busy line. **NOTE:** You cannot modify or delete this prompt using AM.
clientnumconfirm	"If this is correct, press one. If this is not correct, press two."	Project option "Validate Phone Number."
confextend	"The conference will be ending soon. To extend this conference, press 1. To rejoin the conference without extending the time, press pound (#)."	Played to conference participants.
confminutes	"Using your touch-tone telephone keypad, please enter a number between 1 and 300 to indicate the number of minutes you wish to extend this conference."	Played to the agent who scheduled the conference.
countryblocked	"We are sorry, the country code you entered cannot be dialed from our system."	Call blocking option
countrycodeenter	"The country code you entered is "	Workgroup option Allow customer to request a callback on page 207.
customeridentered	"The customer id number you entered is"	Project option "Ask for customer ID."
customeridnum	"Please enter your customer id number followed by the pound key"	Project option "Ask for customer ID."
day01 - day31	"First" through "Thirty-first"	Date and Time
december	"December"	Date and Time
devicenotdefined	"This MSI station id is not available. Please select another MSI station id or contact your network administrator."	Played upon picking up an MSI agent extension that has not been configured. **NOTE:** You cannot modify or delete this prompt using AM.
entermailbox	"Please enter your mailbox number, followed by the pound key."	Agent voicemail retrieval.

Table 43. CCA System Prompts Sorted by File Name

Filename (.wav)	Default Recording	Default Application Location
entername	"Please enter the last name of the person you wish to reach using your touch-tone telephone keypad. For the letter "Q", use the number seven. For the letter "Z", use the number nine."	Company Directory Navigation.
enterpassword	"Please enter your password, followed by the pound key."	Agent voicemail retrieval.
entertelno	"Please enter your area code and telephone number followed by the pound key."	Project option "Validate Phone Number."
errmsg	"If you would like to make a call, please hang up and try again. If you need help, hang up and then dial your operator."	Contact Center prompt. Played for the agent if the phone is left off hook and no keys are pressed.
extnumber	"Extension number."	Company Directory Navigation.
february	"February"	Date and Time
goodafternoon	"Good Afternoon."	Agent voicemail retrieval.
goodbye	"Goodbye, and thank you for calling."	Project options Validate phone number on page 295, Use Prompt to ask for customer ID on page 296. Workgroup option Allow customer to leave a voicemail on page 208, and after input failure to agent voicemail menus.
goodevening	"Good Evening"	Agent voicemail retrieval.
goodmorning	"Good Morning"	Agent voicemail retrieval.
hearddeletedmsg	"You have heard all of your deleted messages."	Agent voicemail retrieval.
heardnewmsg	"You have heard all of your new messages."	Agent voicemail retrieval.
heardsavedmsg	"You have heard all of your saved messages."	Agent voicemail retrieval.
hundred	"hundred"	Agent voicemail retrieval and workgroup option "Estimated Wait Time."

Table 43. CCA System Prompts Sorted by File Name

Filename (.wav)	Default Recording	Default Application Location
invalid	“Invalid entry”	Invalid Menu Entry.
invalidext	“Invalid extension, please hang up and try your call again”	Played for agents who dial an invalid extension when attempting to call another agent.
invalidmp	“The password you entered does not match the mailbox you selected”	Agent voicemail retrieval.
january	“January”	Date and Time
july	“July”	Date and Time
june	“June”	Date and Time
licensesnotavailable	“The number you have dialed is temporarily unavailable due to excessive traffic. Please try your call again later.”	Played for callers who reach the contact center while the maximum Interactions licensing limit has been met. **NOTE:** You cannot modify or delete this prompt using AM.
listennewarcvm	“Press 1 to listen to your new voicemail messages, press 2 to listen to your saved voicemail messages, press star to return to the main menu”	Agent voicemail retrieval.
listennewarvm_2	“Press 1 to listen to your new Voicemail messages, press 2 to listen to your saved Voicemail messages, press 3 to review your deleted Voicemail messages.”	Agent voicemail retrieval.
listenvoicemailmenu	“To repeat this voicemail, press 1. To save this voicemail, press 2. To delete this voicemail, press 3. To log out, press 4.”	Agent voicemail retrieval.
mailboxmainmenu	“Press 1 to retrieve your voicemail messages, faxes and emails, press 2 to record or rerecord your voicemail greeting, press 9 to repeat these choices”	Agent voicemail retrieval.
mailserverdown	“The system is unable to connect you to the mail server, you may continue into the system and do anything you would ordinarily do except receive voicemail messages.“	Agent voicemail retrieval.

Table 43. CCA System Prompts Sorted by File Name

Filename (.wav)	Default Recording	Default Application Location
march	“March”	Date and Time
may	“May”	Date and Time
msgdeleted	“Message deleted”	Agent voicemail retrieval.
msgkeepedasnew	“Message kept as new”	Agent voicemail retrieval.
msgreceived	“Message received on”	Agent voicemail retrieval.
msgsaved	“Message saved”	Agent voicemail retrieval.
msgsaved_2	“Message saved”	Agent voicemail retrieval.
msgsent	“Message sent”	Agent voicemail retrieval.
music	hold music (56 seconds of light jazz)	Workgroup option Select Prompts for this workgroup on page 209. This also describes how to replace this prompt with a prompt from your Prompt Library.
newacdvoicemailmenu	“You have a new ACD voicemail. To listen to this voicemail, press 1. To decline this voicemail and log out, press 2”	Agent voicemail retrieval.
newmessage	“New message”	Agent voicemail retrieval.
newmessages	“New messages”	Agent voicemail retrieval.
nodeletedmessages	“You have no deleted messages.”	Agent voicemail retrieval.
nomessages	“You have no messages in your mail box”	Agent voicemail retrieval.
nonewmessages	“You have no new messages”	Agent voicemail retrieval.
nopeople	“There are no names that match your selection”	Company Directory Navigation.
nosavedmessages	“You have no saved messages”	Agent Voicemail retrieval.
november	“November”	Date and Time
numberblocked	“We are sorry, the number you entered cannot be dialed from our system.”	Call Blocking.
numconfirm	“If this is correct, press one. To re-enter, press two. To cancel and continue to hold, press three.”	Workgroup option Allow customer to request a callback on page 207.

Table 43. CCA System Prompts Sorted by File Name

Filename (.wav)	Default Recording	Default Application Location
numenter	"The number you entered is "	Workgroup option Allow customer to request a callback on page 207.
october	"October"	Date and Time
pleasehold	"Please hold while we connect you to the Mail Server."	Agent voicemail retrieval.
pm	"p.m."	Date and Time
point	"point"	Numbers
recordmenu	"To rerecord your message, press one. To listen to your message, press two. To send your message, press three. To cancel and continue, press seven."	Workgroup option "Allow Customer to leave a Voicemail."
recordmsg	"Please record your message at the tone. When you are finished, press the pound key."	Workgroup option "Allow Customer to leave a Voicemail."
remoteagent	"This call has been forwarded from the contact center. To accept this call, press one." **TIP:** See "Play announcement to agent" on page 192 for information on when this prompt is played for agents.	Agent option "Play announcement to agent" on page 192.
replymailmenu	"To repeat this message, press two. To save this message, press three. To delete this message, press four. To return to the main menu, press star. To repeat these choices, press nine."	Agent voicemail retrieval.
replymailmenu_2	"To repeat this message, press 2. To keep this message as new, press 3. To delete this message, press 4. To save this message press 4. To send a copy of this message to your email address press 6. To return to the main menu, press star. To repeat these choices press 9."	Agent voicemail retrieval.
ring	Two minutes and nineteen seconds of ringing (25 rings)	Played for direct-dialed calls to an extension. **NOTE:** You cannot modify or delete this prompt using AM.

Table 43. CCA System Prompts Sorted by File Name

Filename (.wav)	Default Recording	Default Application Location
savedmessage	"Saved message."	Agent voicemail retrieval.
savedmessages	"Saved messages."	Agent voicemail retrieval.
select	"Press any key when you hear the name of the person you wish to reach."	Company Directory Navigation.
selectdir	"People matching your selection."	Company Directory Navigation.
selectgreeting	"To listen to your busy message press one, to record or rerecord your busy message press 2, to listen to your recorded name press 7, to record or rerecord your recorded name press 8. To repeat these choices press 9, to return to the main menu press star"	Agent voicemail setup.
september	"September"	Date and Time
servicenotavailable	"The number you have dialed is temporarily unavailable. Please check the number and try your call again later."	Played for callers reaching a phone number for which no CCA Project has been configured. **NOTE:** You cannot modify or delete this prompt using AM.
silence	One second of silence.	Played if no prompt exists for a menu. **NOTE:** You cannot modify or delete this prompt using AM.
thankyou	"Thank you."	Project options "Validate Phone Number" and "Ask for Customer ID." Also Workgroup option "Allow customer to request a callback."
thereare	"There are "	Company Directory Navigation.
thousand	"Thousand"	Agent Voicemail Retrieval and Workgroup Option "Estimated Wait Time."

Table 43. CCA System Prompts Sorted by File Name

Filename (.wav)	Default Recording	Default Application Location
tone	(21 seconds of high-pitched dial tone)	Played for agent after pressing 9 for an outside line. **NOTE:** You cannot modify or delete this prompt using AM.
tone2	(21 seconds of low-pitched dial tone)	Played for agent prior to dialing. **NOTE:** You cannot modify or delete this prompt using AM.
transferto	"Please hold while I transfer you to "	Company Directory Navigation.
unknowndate	"The system is not able to retrieve the date and time of this message."	Agent voicemail retrieval.
verification	"If this is correct, press 1. If this is not correct, press 2."	Project option "Ask for Customer ID."
youHave	"You have"	Agent voicemail retrieval.

8 Creating Administrator, Agent, and Supervisor Accounts

This chapter explains how to create administrator, agent, and supervisor accounts. It includes the following topics:

About User Types

You can use Administration Manager (AM) to create accounts for three main types of users:

- **Agents.** Use Interaction Manager (IM) to handle interactions entering the contact center.
- **Supervisors.** Monitor agent activities using the Supervision Manager (SM) program, but can also log in to IM and handle interactions.
- **Administrators.** Log in to IM and SM, but mainly use AM to create and configure companies and accounts.

Creating User Accounts

CAUTION: Before you can create accounts for agents and supervisors, you must create an Agent Skills Library for your contact center. See "Creating an Agent Skills Library" on page 84.

To create user accounts

1. In AM, from the Navigation Pane (under Options), click Agent Profiles, and then Add. The Agents screen: Profile tab opens.
2. Use the information in the following table to complete the Agent Profile fields, and click OK:

Field	Description
First Name	Type the agent's first name.
Last Name	Type the agent's last name.
Department	Select the department in which the agent works.
Account: Active or Inactive	Click to indicate the agent's current status as either Active or Inactive.

Field	Description
Address Fields	Complete the address fields with contact information for the agent.
Date Hired	Enter the date that the agent was hired to work in the contact center. (Or, you can click the calendar icon to open a calendar, from which you can choose the agent's hire date.)
Username	Type the agent's user name for logging in to AM. **NOTE:** The agent's user name must contain only digits (no letters) for the agent to retrieve the voicemail messages from a remote telephone or to set up voicemail greetings.
Password	Type a password for the user. The password must be digits only (no letters) for an agent or supervisor to retrieve their voicemail messages from a remote telephone or to set up voicemail greetings. If you are using LDAP authentication, the Password and Confirm Password fields are disabled. For more information on CCA support for LDAP, see "Completing the LDAP Authentication Policy" on page 78. **NOTE:** When you create a new user and you are using LDAP, AM makes the user's Oracle password the same as the user name. This default password is never used as long as you continue to use LDAP. But, if you decide to stop using LDAP and go back to the Oracle Security Policy, your users will still be able to log in by entering their user name as their password. The default password mechanism is designed to make it easier to return to the Oracle Security Policy after you have been using LDAP.

About User Capabilities

There are six possible user types and each type has different access rights to CCA areas and functions. Refer to Table 44 to understand the capabilities of the different user types.

Table 44. User Roles and Capabilities

User Role	Capability
Agent	Agents can do the following: ■ Log in to IM. ■ Accept interactions. ■ Create Contacts. ■ Transfer customers and participate in conferences. ■ Use chat features. ■ Manage tasks. ■ Participate in predictive calling.
Supervisors	Supervisors can do the following: ■ Log in to IM and SM. ■ Access all agent features. ■ Supervise agents (Listen, Coach, Join, Hang up, log out, Broadcast, Chat, Record). ■ Set alarms. ■ Monitor agent statistics, workgroups, projects, and interactions. ■ Review recordings. ■ Run any reports that administrators created. ■ Control and monitor predictive dialing **NOTE:** You can create supervisors with either *full* or *limited* permissions. See Table 44 on page 185.
Guest Supervisors	Guest supervisors can do the following: ■ Log in to SM ■ Set alarms ■ Listen to and monitor the status of agents that are assigned to them

Table 44. User Roles and Capabilities

User Role	Capability
Administrators	Administrators can do the following: ■ Log in to AM, SM, and IM. ■ After the system administrator gives them access, they can edit the data, settings, and configurations in their company. ■ Create agents, supervisors, and guest supervisors. ■ Create reports.
System Administrators	System administrators can do the following: ■ Log in to AM. ■ Access all features available to administrators. ■ Edit all of the data, settings, and configurations in their company. ■ Restrict access of administrators to program features.
Network Administrators can (If Configured)	Network administrators can do the following: ■ Log in to AM. ■ Access all features available to system administrators. ■ Create new companies. ■ Edit all of the data, settings, and configurations in any company. ■ Create agents, supervisors, guest supervisors, administrators, system administrators, and network administrators. **NOTE:** This account is available only if your system is configured for it.

About Restrictions on Account Permissions

The following restrictions apply to account permissions:

- After an account exists, you can change the access permissions of the four, lowest account-types (agent, supervisor, guest supervisor, and administrator). For example, you can create an agent account and then, later, change the agent to a supervisor or administrator. You can do this for any of the four basic, account-types.
- After creating a system administrator or network administrator account, you cannot change the access permissions. For example, if you create a system administrator account and, later on, you want to change the access permissions to supervisor, you must first delete the account, and then create a new supervisor account from scratch.
- A network administrator can create any type of account.
- A system administrator can create administrator accounts and the lower account-types.

- An administrator account can create supervisor accounts and the lower account-types.

Creating Restrictions on Account Permissions

Create restrictions on account permissions for each agent account by selecting Options and then Agents.

To create restrictions on account permissions

1. Select Options and then Agents. Then, select the Controls and Restrictions tab.
2. Use the information in the following table to complete the Agent Controls and Restrictions screen:

   NOTE: Make sure ACD calls have a higher priority than voicemail in the workgroup queue. Voicemails are considered to be offline interactions.

Field	Description
Allow call recording In Interaction Manager	**NOTE:** Select this check box to allow this agent to record conversations with callers when logged in to Interaction Manager. CCA does not allow recording of agent-to-agent calls. **CAUTION:** Make sure call recording is allowed by law in the agent's location.
Disable Call Trace	Select this option to disable agents from tracing a call (which might be needed in an emergency). When enabled, the Call Trace feature also activates recording and alerts the agent's supervisor.
Enable automatic recording of Agent	Select this check box to record this agent at random times for quality monitoring. **NOTE:** Agent-to-Agent calls (internal extension) are not recorded by this feature. All other call types (ACD and direct external number) are recorded. This field does not appear if the company definition includes the option to automatically record 33% of interactions.
Percentage of calls to record	Select the percentage of interactions to record automatically when the agent is logged in to IM. For example, if you select 20, then CCA records two out of every ten interactions that the agent receives. **NOTE:** This field will not appear if the company definition includes the option to automatically record 33% of interactions.
Set the number of rings the system will wait for an Agent to answer	Enter the approximate number of times to ring the agent's extension before setting the agent's status to, No Answer, and placing the workgroup callback into the queue. **NOTE:** The agent and customer might not hear the exact number of rings you specify. CCA plays ring.wav for ((n * 4)+6) seconds, where n is the value that you specify.

Field	Description

Set the Maximum Number of Interactions the Agent will Handle Simultaneously	■ Chat—Type the maximum number of simultaneous chat interactions CCA is allowed to route to the agent, while the agent is logged in to IM.
	■ Offline—Type the maximum number of simultaneous offline interactions (fax, email, and voicemail) CCA is allowed to route to the agent, while the agent is logged in to IM:
	  ■ When an agent accepts an interaction, CCA automatically changes their status to *Busy*. If you set the Max Number of Simultaneous Interactions to at least 2, the agent can click the *Available* button and accept another interaction.
	  ■ When the agent reaches the limit that you set, the agent will not be able to accept any more interactions, even if they click the *Available* button.
	NOTE: This field affects only chat and offline interactions (fax, email, and voicemail). No matter what you set in this field, agents can always accept an unlimited number of phone interactions.

Inactive Session Timeout	Use the Inactive Session Timeout to automatically log out a user after a period of inactivity. This applies to agents, supervisors, and administrators. Use the Inactive Session Timeout in the Controls and Restrictions tab to set an inactivity timeout for an individual account. You can also apply an Inactive Session Timeout to the entire company. (Navigate to Options, Company, Profile tab, Inactive Session Timeout.) Note the following: ■ Disable Session Timeout. CCA will never automatically log out the account. ■ Enable Session Timeout. Select a timeout value between 5 minutes and 24 hours.
Allow Outbound Calls	Note the following: ■ Use Company's Default. If selected, the agent's ability to make outbound calls will be taken from the Allow Outbound Calls drop-down list. (Navigate to Options, Company, Company Configuration.) ■ Disable. If selected, the agent can never make outbound calls.
Enable international long distance dialing	Select this option so that the agent can make long-distance calls to any country code from their workstation.
Restrict long distance dialing to this country code	Select this option so that the agent can make long-distance calls only to a specified country code.

Field	Description
Project Billing	Select the project to use as the default billing project for this agent in IM.
Allow wrap up time after calls	Select this check box so that the Agent has time to wrap up a concluded phone interaction (ACD call, callback, and Web callback). After the wrap-up time expires, CCA changes the agent's status to Available and routes the next interaction. **NOTE:** Wrap-up does not apply to direct inbound or direct outbound calls. As soon as an agent disconnects from a direct inbound or outbound call, the status immediately changes to *Available*.
Wrap-up time	Type the number of seconds the agent is given to wrap up a concluded phone interaction. **NOTE:** Wrap-up does not apply to direct inbound or direct outbound calls.
Require outcome	Select this check box so that the agent can access the Outcome Library at the conclusion of interactions. Requiring agents to record an outcome after each interaction allows you to track the results of interactions. **NOTE:** This is only one of several steps required to enable outcomes. Selecting this option alone is not enough. You must also create one or more outcomes (Libraries, Outcomes) and add the required outcomes to your project (Navigate to Options, Projects, Outcomes tab).You must enable outcomes so that agents can reschedule a Web callback or ACD callback interaction.
Display this Agent in the Company Directory	If this check box is selected, CCA adds the agent to the Company Directory.
When the Agent is logged out, send the call directly to voicemail	If this check box is selected and the agent is logged out, CCA sends all calls that are routed to the agent immediately to voicemail.
Status of the Agent at Login	This setting affects only the agent's state when first logging in to IM. Afterwards both the agent and the system change the agent's state. **NOTE:** The list box contains only the predefined system statuses (Available, Busy, Last Call, and On Break). You cannot select a custom status.

Field	**Description**

The agent will listen to the ACD Voicemail by:	Use this field to specify whether agents use their email or their phones to access an ACD voicemail:
	■ If you click Email, the agent can:
	  ■ Access ACD voicemails by accepting the voicemail as an interaction
	  The system starts the agent's email client. The voicemail appears as an email attachment.
	  ■ Open the sound file attachment and listen
	■ If you click Phone, the agent can access ACD voicemails by accepting the voicemail as an interaction.
	The contact center rings the agent's phone and gives the agent several options, one of which is to listen to the voicemail.

Allow Phone Only Access	Select this option to enable phone-only user functionality. When selected, this user can accept ACD calls without being connected to the Internet or using a Web browser. The user must log in using a telephone (IVR or similar). This requirement applies to all user types.If the default option is unchecked: ■ If the user is working off-hook, CCA plays a prompt to confirm the login and instructs the user to hang up and wait for calls. CCA also places the user in the “Available” state. After finishing the first call, the user does not hang up and remains connected to receive additional calls. CCA logs the user out of the system when the user hangs up. ■ If the user is working on-hook, CCA plays a prompt to confirm the login and instructs the user to hang up and wait for calls. CCA also places the user in the “Available” state. After finishing the first call, CCA drops the user’s connection to the system and the user hears a busy signal. The user hangs up and waits for the next call.
Supervisor Permissions	If you are creating or editing a supervisor account, you can use the Controls and Restrictions tab to give the supervisor either limited or full permissions. A supervisor with limited access sees only information related to the assigned agents in SM. A supervisor with full access sees the information for all agents, workgroups, and interactions for the entire company. **NOTE:** The access level you give to a supervisor affects several screens in SM. See the *Contact Center Supervision Manager Guide* for more details.

3 Select the Regional Settings tab.

4 Use the information in the following table to complete the Agent Regional Settings:

Field	Description
Select Time Zone	Choose the time zone in which this agent works. If the agent configures IM to User Defined Time Zone (instead of the company time zone), then the time zone you choose becomes the agent's default time zone. However, the agent can override your selection at the workstation. **TIP:** See "Configuring Company Time Zone and Date Format" on page 65.
Select Date Format	Choose the date format for the area in which this agent works. The date format you choose becomes the agent's default date format. However, the agent can override your selection at their workstation (to use a date format of their choosing).

5 Select the Email tab.

6 Use the information in the following table to supply the agent's email information:

Field	Description
Agent Email Address	Type the full email address for CCA to use when routing email interactions to the agent.
Host	Type the name of the computer hosting the POP3 server that this agent uses.
User	Type the user name for the agent to use when accessing the POP3 server.
Password	Type the password for the agent to use when accessing the POP3 server.
Enable SSL	Select this option to add secure POP3 and SMTP connections to Mail Servers. **NOTE:** This option is supported for Win32 and Solaris applications only.
Select SMTP Group	Choose the SMTP Server Group for CCA to use when handling mail sent by this agent.

7 Select the Phone tab.

8 Use the information in the following table to supply an extension number and phone type for the agent:

Extension Type	Description
Agent Extension Number	Type the extension number for the agent. **NOTE:** If you do not know the agent's extension number, contact the administrator or the provisioning department at the customer site.
H323	Select this option if the agent uses a H323 system, and then type the IP address in Address box.
SIP	Select this option if the agent uses a SIP system and then type the IP address in Address box.
PBX	Select this option if the agent is a member of a Public Branch Exchange system, and then type the agent's PBX extension number in the Phone box.
Outside phone	Select this option if the agent works remotely, and then enter the agent's country code and telephone number in the Country and Phone boxes, respectively.
Play announcement to agent	Select this option to play the prompt remoteagent.wav. This sound alerts the remote agent that the call is a CCA call and gives the agent the opportunity to accept or reject the call.
Dialogic Analog Extension	Select this option if the agent is a member of an MSI system, and then type the MSI ID number in the MSI ID box.
No Phone	Select to send all calls directly to the agent's voicemail.
Work Off Hook	Users can select to have their MSI extensions set to work off-hook. When off-hook, there is no dial tone and beeps play when a call is incoming. With off-hook, users can also have calls auto-accepted without having to answer their headset for each call.
Automatic Call Acceptance	If you selected Work Off Hook, choose Automatic Call Acceptance so that the interaction is automatically accepted by the agent.
Direct Inward Dialing	Select a Company DNIS number. CCA automatically routes the customers who call that number to this agent. The agent's name also appears in the Agent's Direct Inward Dialing Number (Company, DNIS tab), to indicate that the DNIS was assigned to the agent. **NOTE:** For calls that CCA routes directly to an agent to appear in reports (such as Direct Dialing Statistics and Project Key Statistics), you must select a Billing Project for the agent. (Navigate to Options, Agents, Controls and Restrictions, Project Billing check box.)

9 Select the Skills tab.

10 Enter a rating between 1 and 100 for each skill in the Skill Level Rating column.

NOTE: The greater the rating you assign to the skill, the more you increase the likelihood that CCA routes interactions requiring this skill to this agent.

11 Click Follow Me.

12 Click Activate Follow Me. The Agents screen: Follow Me tab opens.

13 Use the information in the following table to complete the Follow Me options screen, and click OK:

Field	Description
Activate Follow Me	When Follow Me is enabled, CCA forwards direct inbound calls (call made directly to an agent) to the Follow Me phone numbers or IP addresses, if the agent does not answer the primary extension. The Follow Me feature does not forward ACD calls (calls routed to an agent through a workgroup). CCA places these calls back in the queue for handling by the next available agent. **NOTE:** For call forwarding to occur, you must enable the Follow Me option for both the agent and the agent's project. **TIP:** See "Enable Follow Me" on page 298 for information about enabling the Follow Me option for a phone project.
Define follow me numbers	**The following options are available:** ■ Outside Phone—From the drop-down list, select a country code and type the number that CCA forwards the call to if the agent does not answer their extension. ■ SIP—Type the IP address to which CCA forwards the call.

14 Click Applet Console Configuration. The Agents screen: Applet Console Configuration screen opens.

This tab contains settings that are mainly for advanced troubleshooting. You can use these settings at the Company level (Navigate to Options, Company, Applet Console Configuration.), or for individual agents (Navigate to Options, Agents, Applet Console Configuration).

15 Use the information in the following table to complete the Applet Console Configuration screen:

Field	Description
Close Connection	The CCA applications (AM, IM, and SM) occasionally connect to the CCA Web server to find messages (interactions, statistics updates, and so on): ■ If the Close Connection box is not checked, the applications continue to use the same HTTP connection to the Web server indefinitely. ■ If this box is checked, the connection is re-established every 60 requests.
Disable Agents Cache	When a user logs in to IM or SM, CCA downloads the information about the status, workgroups, users, URLs, outcomes, and so forth from the database so that it will appear in the application. CCA keeps this information in memory while the user is logged in. However, when the user logs out, CCA writes all the data to temporary files on the user's hard drive. CCA does this so that the next time the user logs in, the user downloads only information that is new or that has changed, rather than downloading all the data. Changes include a new project or outcomes, or deleted or edited information. If you select this check box, CCA downloads all information needed by the application from the database each time the user logs in. **NOTE:** Selecting this check box can result in CCA consuming large amounts of resources on both the server and the user's machine.
Debug Level	Select the debug level to allow CCA to generate different levels of debug information. You can view the debug information in a file, Telnet window, or the Java console: ■ Off—CCA does not generate any debug information. ■ Debug—CCA generates most debugging information about the system. ■ Info—CCA generates minimal debug information. ■ Error—CCA generates only error information. ■ Fatal—Only information about fatal errors. ■ All—CCA generates all debug and error information. **NOTE:** If you choose to send the information to the Java console or Telnet, the All option consumes most of your memory and CPU.
Enable Telnet	Select this option so that you can view debug information in a Telnet window. **TIP:** See "Process of Enabling Telnet" on page 82.
Time to Login (in minutes)	Type the amount of time that IM will wait before downloading all required information from the database and logging in to the IM server. **NOTE:** If the login takes more than this amount of time, IM automatically logs out.

Field	Description
Enable log file Log File Full Path	Select this option to write debug information to a file: ■ The path must include the filename. ■ CCA creates folders if they do not exist. ■ CCA writes a debug file to this path on every agent's machine.
Ping Delay in Seconds	The CCA applications (AM, IM, and SM) occasionally connect to the CCA Web server to find any messages (interactions, statistics updates, and so on). From the drop-down list, select the time (Ping Delay in Seconds) that CCA applications will wait before sending their next request to the Web server.
Disable wrap up timer	If checked, the wrap-up timer will not appear to agents in IM, which can prevent flicker on some screens.
Disable elapsed (interaction) timer	If checked, the interaction timer will not appear to agents in IM, which can prevent flicker on some screens.
Disable Phone State timer	This is the animated phone icon, which appears in the IM Information Bar. If checked, the animated icon will not appear to the agent. The agent will always see the on-hook icon. Selecting this option can prevent flicker on some screens.
Allow Multi ACD Interaction	If this option is selected, CCA allows multiple ACD interactions.
URL Timeout in Seconds	Type how long the application (AM, IM, and SM) must wait for a response from the Web server before ending the connection and resending the request.

16 If you click the Departure Reason tab, you cannot enter any information while creating an agent.

The Departure Reason tab is only for the existing agents. This tab lets you enter the date and reason why an existing agent left the company. It also removes the agent's profile from the system.

NOTE: Use the Departure Reason tab only for existing agents.

TIP: See "Creating an Agent Departure Reasons Library" on page 88.

17 Click Agents to Supervise. The Agents screen: Agents to Supervise screen opens.

If you are configuring a supervisor or an administrator, use this tab to assign agents for them to supervise. When a supervisor has an assigned agent, the supervisor can interact with that agent using SM (view, monitor, obtain agent statistics, and so on).

Supervisors can interact only with agents that are assigned to them.

NOTE: You cannot assign more than 100 agents to the same supervisor.

18 Select the check box next to each agent to assign to the supervisor.

19 Click Administrator Configuration.

The Agents screen: Administrator Configuration tab opens. Use this screen to limit administrator access to the features of AM.

Some changes to this screen are difficult to undo. Consider carefully any changes before you make them.

You can use this tab only when configuring an administrator:

- Both network administrators and system administrators have access to this tab.
- The screen lists every Navbar item in AM. If you uncheck an item, the administrator that you are configuring will not see that item the next time that the administrator logs in.
- When you uncheck (and apply) an item, you can restore it only by:
  - Modifying the database
  - Deleting the administrator and re-creating that account

20 Click Supervisors. The Agents screen: Supervisors tab opens.

If you are configuring an agent, use this screen to assign the agent to a supervisor. You can also assign agents to a supervisor by configuring a supervisor and using the Agents to Supervise tab.

NOTE: You cannot assign more than 100 agents to the same supervisor.

The Supervisors tab lists a supervisor only if one of the following is true:

- The supervisor has less than 100 agents
- The supervisor has more than 100 agents, but is supervising the agent you are editing.

a Select the check box next to the name of each supervisor that will be allowed to supervise this agent.

21 Click Workgroups. The Agents screen: Workgroups tab opens.

a Select the check box next to each workgroup in which you want to make this user a member. There is no limit to the number of workgroups to which a user can belong.

22 Click the Partitions tab, if configured.

a Check all the partitions that you want to apply.

23 Click the Unified Messaging tab. The Unified Messaging screen opens.

24 Select one of the following choices:

- Company Default. Sets the user to use the company default setting (set in the Unified Messaging tab of the Company screen). For more information, see "Storing Voicemails (Unified Messaging)" on page 81.
- Mail Server. Stores voicemails on the Network Email Server.
- Internal Voicemail. Stores voicemails locally.

Finding an Agent

If your company employs a large number of agents, you can use the Agent Search tool to quickly locate an agent from a large list of agents.

To find an agent

1. Click Options and then Agents. The Agents main screen appears.
2. Select a column heading to search for items in that heading:
   - To view a list of all accounts, make sure that there is no text in the Find text box, and then click Go.
   - To sort the list of agents, click any column header.
   - To search on a column, select a column, and click a letter or number (A-Z or 1-0).
   - You can also select a column, enter a string or substring in the Find text box, and then click Go.
   - To search using a wildcard, select a column, type % (percent sign) as a wildcard character, and then type a substring and wildcard in the Find text box. For example, to find Roger, enter Rog%, %og%, and %er.

     NOTE: You cannot use wildcards when you search on the Permission column.

Example Search 1: Displaying All Agents, but No Supervisors or Administrators

1. Select the Permission column.
2. In the Find text box, enter agent, and click Go.

   Only agents will be listed.

Example Search 2: Listing Everyone Whose Last Name Begins with *R*

1. Select the Last Name column.
2. In the letter bar, click R.

   All agents, supervisors, and administrators whose last name begins with the letter *R* appear.

Multiple Pages of Results

If your search returned more than one page of agents, use the controls at the bottom of the list to move from page to page. You can change the number of agents to display on each page by clicking the number list box at the bottom of the screen. Table 45 describes how to move through the list:

Table 45. Managing Multiple Pages

Click	To Display
<<First	The beginning of the agent list.
<Previous	The previous group of agents (based on the maximum number you have chosen to display).
Next>	The next group of agents (based on the maximum number you have chosen to display).
Last>>	The end of the agent list.

Deleting an Agent Account

If you create an agent account that later you decide is not needed, you can delete the account. Deleting departed agents frees space in the CCA database and ensures that an invalid agent account will not appear on AM screens.

To delete an agent account

1. Before you can delete an agent account, you must ensure that the account is not in use by CCA by checking the following:

   - Remove the agent account from all workgroups.

     TIP: See "Adding and Removing Agents from Workgroups" on page 203.

   - Remove the agent account as the designated voicemail greeting for all workgroups.

     TIP: See the Workgroup option "Go to voicemail, play Agent greeting" on page 208.

   - Remove the agent account assignment from all supervisors.

     TIP: See the Supervisor tab under "Creating User Accounts" on page 183.

   - Remove the agent account as the routing target for calls reaching a phone project.

     TIP: See the Agent option in the section "Process of Adding Phone Interactions to a Project" on page 294.

   - Remove the agent account as the routing target for a touch-tone menu selection.

     TIP: See the Extension option in the section "Creating Standard Menus" on page 220.

   - Remove the agent account as the routing target for an action in all campaigns.

2. In AM, from the Navigation Pane (under Options), click Agent Profiles.

3 Find and select the agent to delete.

TIP: See "Finding an Agent" on page 197.

4 Click the Departure Reason tab. The Enable departure reason check box appears.

5 Select the Enable departure reason check box. A warning message appears, and then click OK.

A second message appears to make sure you really want to remove this agent. When you remove the agent, you cannot undo your actions.

a Click OK.

The agent is permanently removed from the system and additional fields.

b From the drop-down list, select a departure reason.

NOTE: For more information, see "Creating an Agent Departure Reasons Library" on page 88.

c In the Departure Date box, select a date from the calendar.

d In the Note box, type any additional information you might want to keep about why this agent left, and click OK.

All of the agent's profile information is deleted from the system.

Process of Setting Up Proxy Servers

If you have proxy servers on your network, you can configure AM so that CCA users (agents, supervisors, and even administrators) must log in to a proxy server before they can log in to a CCA application:

- You can add as many of your proxy servers as you want to AM.
- You can configure each proxy server entry with a custom list of agents, supervisors, and administrators. For example, you can require technical support staff to log in through one proxy server, and the sales agents to log in through another proxy server.

Adding a Proxy Server Entry

Follow these steps to add the proxy server CCA users must log in to before they can log in to a CCA application.

To add a Proxy Server

1 Under Options, click Proxies.

2 Click Add.

3 Click the Name tab. The Proxies screen opens to the Name tab.

4 Enter a name and description of the proxy server. The name and description that you enter are only used in AM.

5 Click the Settings tab.

6 Use the information in the following table to complete the Proxies Settings screen:

Field	Description
Username	This is the user name that agents, supervisors, and administrators enter to be authenticated by your proxy server.
Password	This is the password that agents, supervisors, and administrators enter to be authenticated by your proxy server.
Manage Communication Resources	Select this option to periodically renew communication sockets on the Proxy Server. If agents and supervisors connecting through the Proxy Server experience login or connection problems, select this check box and instruct your agents and supervisors to log in again.

7 Click the Agents tab.

8 Select the agents and supervisors who are required to access CCA through the Proxy Server and then click OK.

Logging In Through a Proxy

The following is how any user assigned to a proxy server logs in to CCA:

To log in through a Proxy Server

1 The user starts Internet Explorer and enters the application URL (for AM, SM or IM).

2 The following can occur:

- If the user is outside a firewall, a dialog box appears asking for the network login.
- If the user is not outside the firewall, the CCA normal login page appears for the application.

3 The user enters a user name and password.

A dialog box for the user’s proxy credential appears.

4 The user enters the user name and password that you entered in the Proxy - Settings tab, and then clicks Yes.

CCA opens normally.

9 Setting Up Workgroups

This chapter describes how to set up workgroups for your contact center. It includes the following topics:

About Workgroups

A CCA *Workgroup* is a group of agents that do the same, or a similar job in the contact center. In many cases, these workgroups reflect the company's departments. For example, you might create workgroups called *Sales*, *Technical Support*, and *Customer Service*, to represent the agents who work in those departments in the company.

The agents in a CCA workgroup do not need to be sitting in the same room or even in the same building. Because CCA agents can connect from any computer with an Internet connection, workgroup members can reside in various, distributed locations.

Workgroups also allow you to specify the agent skills that are important for agents in a workgroup to possess. By assigning weights (importance) to the agent skills in a workgroup, CCA can identify and route interactions to the agent most qualified to receive them.

Finally, workgroups allow customer prioritization. For example, if a customer (identified as *Platinum*) enters a workgroup queue, you can make sure this caller reaches an agent before a *Standard* customer.

TIP: See Chapter 17, "Prioritizing Phone Customers" for information on assigning a priority level to each customer.

NOTE: Not all contact centers use workgroups. If you do not need to route customers to different groups of agents, and you do not use customer prioritization, then you can route callers directly to specific agents and do not need to create workgroups for the contact center.

What Happens If No Workgroup Agents Are Logged In?

If CCA routes a phone interaction to a workgroup for which no agents are logged in, CCA lets the caller leave a message and changes the interaction type from *ACD Call* to *ACD Voicemail*. Then, when an agent who is a member of the workgroup logs in to IM, CCA immediately sends the ACD Voicemail interaction to the agent for handling.

Call Flow Overview

CCA routes a call to an agent as follows:

1. A customer calls the contact center.
2. CCA uses the number that the customer dialed to find the corresponding project.
3. The contact center verifies that the company has a valid license.
4. CCA routes the call to a workgroup queue and waits for the ACD Server to assign the call to an agent.
5. When an agent is available, the CTI Server finds the agent's extension. CCA dials the agent's extension and the IM Server offers the interaction to the agent.

Creating a Workgroup

Before creating a workgroup, the following must exist:

- **Agent accounts.** For more information, see Chapter 8, "Creating Administrator, Agent, and Supervisor Accounts."
- **Defined agent skills to support the workgroup.** For more information, see "Creating an Agent Skills Library" on page 84.

To create a workgroup

1. Select Options, Workgroups, and then Add. The Add Workgroups screen opens to the Name tab.
2. Use the information in the following table to complete the fields, and then select Apply:

Field	Description
Workgroup Name	Type the name for this workgroup.
Description	Enter text describing how you will use this workgroup, the common job function performed by agents in this workgroup, or the types of customers this workgroup will handle.

Adding and Removing Agents from Workgroups

Before adding agents to a workgroup, agent accounts must already exist.

TIP: See Chapter 8, "Creating Administrator, Agent, and Supervisor Accounts."

To add and remove agents from workgroups

1. Select Options and then Workgroups.
2. Select the workgroup, and then select Edit.

   The Workgroups screen appears.
3. Select the Agents tab to access the Workgroups screen, Agents tab.
4. Select the check box next to an agent's name to add the agent to the workgroup. (The same agent can belong to multiple workgroups.)
5. To add all agents to the workgroup, select All.
6. To remove all agents from the workgroup, select Clear.
7. Select Apply.

Setting a Routing Association

Normally, CCA routes new interactions to the first available agent in the workgroup. However, you can use the Association tab to route a customer to the last agent who worked with that customer.

To set a routing association

1. Select Options, and then Workgroups.
2. Select the workgroup, and select Edit.

   The Workgroup screen appears.
3. Select the Association tab.

4 Use the information in the following table to complete the Association screen:

Field	Description
Allow routing association to wait up to [ ]seconds	If checked, CCA tries to route the interaction to the agent who took the last interaction from this customer (the preferred Agent). If that agent is not available within the amount of time set, CCA routes the interaction to the first available agent in the workgroup. CCA tries to route to the preferred agent only if: ■ The agent account was not deleted. ■ The agent is still a member of the workgroup that received the interaction. ■ The agent is logged in.
Force routing association even if Agent is logged out.	If checked, CCA tries to route the interaction to the preferred agent, even if the agent is logged out. CCA waits for the amount of time set in the Seconds text box. If the agent does not log in within that time, CCA routes the interaction to the next available agent.

About Assigning Skills to a Workgroup

CCA uses agent skills to identify and route callers to the agent most qualified to handle the interaction. Specify the importance of each skill in the workgroup, so that customers reaching the workgroup are connected to the agent best qualified to handle the interaction.

Weighing the Skills in a Workgroup

When CCA routes a call requiring a specific agent skill to a workgroup, it chooses an agent based on a formula that considers both the agent's score for the required skill and the weight that you assign to that skill for the agents in this workgroup.

To weight skills in a workgroup

1. Select Options and then Workgroups.

   The Workgroups screen appears.

2. Select the Workgroup, and then select Edit.

   The Edit Workgroups screen opens.

3. Select the Skills tab.

4. In the Skill-level Weight column, type the weight number (importance) to assign to each skill. Assign a weight of 0 (zero) to indicate that this skill is not considered when selecting the best agent to receive the interaction.

   NOTE: The combined weights for all skills in the workgroup must equal 100.

5 Select OK.

Defining Workgroup Overflow Conditions

To make sure that interactions waiting too long for an agent are given immediate attention, define the workgroup overflow conditions. CCA handles two workgroup overflow conditions:

- Interaction wait-time exceeded
- Number of queued interactions exceeded

CCA implements the overflow action you specify if a customer has been waiting in a workgroup queue longer than the maximum time, or if the number of queued interactions exceeds the maximum.

You can configure all overflow conditions, parameters, and corrective actions. You can raise the customer's interaction priority, or let the interaction go to a queue handled by both the original workgroup and the overflow workgroup, so that the interaction is answered by the first available agent in either workgroup.

To define workgroup overflow conditions

1 Select Options and then Workgroups.

The Workgroups screen appears.

2 Select the Workgroup and then select Edit.

The Edit Workgroups screen appears.

3 Select the Overflow tab to access the Overflow screen.

4 Check Enable Workgroup overflow. The screen refreshes to display the Workgroup Overflow screen.

5 Use the information in the following table to complete the fields on the Workgroup Overflow tab:

Field	Description
Overflow occurs when an Interaction has been in queue for more than ___ sec.	Select this option to take the specified overflow action on the interaction in the front of the queue, if the interaction has been waiting longer than the time that you specify.
Overflow occurs when the number of queued Interactions per Agent exceeds ___	Select this option to take the specified overflow action on the interaction in the front of the queue, if the ratio of the interactions to agents exceeds the number you specify.
Use Max. Calls per Agent	Select this check box, and enter the maximum number of calls that agents can accept. You do not need to restart the ACD Server to enable this change.

Field	Description
Overflow occurs when the number of queued Interactions exceeds ___	Select this option to take the specified overflow action on the interaction in the front of the queue when the number of interactions in the queue exceeds the number that you specify.
Increment Interaction priority by ___	Choose to increment the interaction's priority** setting by the specified number, when the specified Overflow occurs condition is met.
Transfer Interaction to Workgroup ___ with a priority of ____	Choose to move the interaction to the specified workgroup and adjust the interaction's priority** when the specified overflow occurs condition is met. **NOTE:** A phone interaction transferred to an overflow workgroup does not hear the workgroup prompts for the overflow workgroup. **TIP:** See "Select Prompts for this workgroup" on page 209 for information on Workgroup prompts.
Route to Project Menu	Route the call to a project menu (phone menu). **TIP:** See Chapter 10, "Creating Project Menus" for more information.
Deflect calls when Max. Calls Waiting per Agent is _____	Type the maximum number of waiting calls that, when reached, will trigger CCA to deflect any further calls.
** The IM Information Bar displays the priority of the transferred interaction as selected when defining the workgroup overflow condition.	

6 Select OK.

Setting Workgroup Options

Set up workgroup options by following these steps:

To set workgroup options

1 Select Options and then Workgroups.

The Workgroups screen appears.

2 Select the Workgroup, and then select Edit.

The Edit Workgroups screen appears.

3 Select the Options tab.

4 Use the information in the following table to complete the fields in the Workgroup Options tab:

Option	Description
Initial Wait Time	Type the number of minutes it takes an agent to complete a typical interaction. CCA uses this number as a baseline to begin calculating the average wait time to report to callers. The wait time reported to callers reflects the conditions in the workgroup and might be different from the wait time you enter. CCA uses the historical wait times to calculate the average wait time, after new interactions enter the workgroup.
Play estimated wait time	Select this option to inform the customer (phone or Web chat) of their estimated wait time. If the customer's estimated wait time is greater than 99 minutes, CCA does not inform the customer of the wait time. **NOTE:** If you change the setting for, Play estimated wait time, you must re-create your Chat Request form for the changes to take effect in your chat project. **TIP:** See "Generating a Chat Request Form" on page 328 for information on re-creating your Chat Request form.
Allow customer to request a callback	Select this option to let the caller request a callback, if agents are busy. Selecting this option causes the system to play the prompt acdcallback.wav to the customer, and allows the customer to enter a number where the customer can be reached. **TIP:** See "Workgroup Option Prompts" on page 168. **NOTE:** If the customer enters a callback number that is different from the number that originated the call, CCA uses the customer-supplied number to perform the callback and to look up the customer's contact information during the callback interaction. **TIP:** For agents to reschedule a callback, you must also require agents to assign an outcome to the interaction.See "Creating Interaction Outcomes and Callbacks" on page 132.
Always Use This Country Code	If this option is not selected, CCA prompts the customer for a country code. If this option is selected, CCA calls the customer back using the country code specified.

Option	Description

Allow customer to leave a voicemail	Select this option to allow a caller waiting in the queue to leave a voicemail message for the next available agent. CCA prompts the caller to enter the following prompts (played in this order):
	`acdmenu.wav`
	Greeting for the selected agent
	`acdvoicemail.wav`
	TIP: See “Workgroup Option Prompts” on page 168 for more information about the acdmenu.wav and acdvoicemail.wav prompts.

Allow Customer to Route to Project Menu	Select this option to allow a caller waiting in queue to select the option to be routed to a new project menu. CCA automatically plays a default prompt (acdnewmenu.wav). You can also choose another prompt from the Select Prompt list.
Stay in the Queue	If selected, the caller remains in the queue until an agent logs in and becomes available.
Disconnect	If selected, and no agent is logged in, the caller is disconnected immediately.
Go to voicemail, play Agent greeting	Tells CCA to select an agent with a recorded greeting. CCA sends the call to the voicemail and plays the agent’s greeting followed by acdvoicemail.wav (*Press one to leave a voicemail message.*). See “Allow customer to leave a voicemail” on page 208.
Route to Menu	Routes the caller to the menu you select from the drop-down list. (Use this, after meeting specific thresholds, to discontinue answering calls and give new callers an intercept message. For more information, see Chapter 10, “Creating Project Menus”.)

Option	Description
Do not play ACD intro	If checked, CCA does not play the prompt under, Select Prompts for this Workgroup, Intro list box if no agents are logged in. (If you know that no agents are available, and you want to route the call to Disconnect, Go to Voicemail, or Route to Menu, you probably do not want to play an ACD introduction prompt telling the customer to wait for an agent.)
Select Prompts for this workgroup	Workgroups can play several types of prompts. For each type, select the System Default or a custom prompt. For more information, see “Overview of Custom Company Prompts” on page 154. Workgroups play the following prompts: ■ Intro. The initial greeting CCA plays to the caller when entering the workgroup. Choose System Default to play the “acdintro” on page 169. ■ Hold. The prompt CCA plays to a caller who just entered the queue for the first time or who has returned to the queue after being unable to reach an agent. (The agent was logged out or did not answer). CCA plays the Hold prompt after the Music prompt ends. Choose System Default to play the “acdrepeat” on page 169. ■ Whisper. The prompt CCA plays to an agent right after the agent accepts an ACD call and while working off-hook. The customer cannot hear the prompt. ■ Ring. The prompt CCA plays when the system is connecting the caller to an available agent. Choose System Default to play the “acdring” on page 169. ■ Music. CCA plays the Music prompt right after the Intro prompt, while the caller is waiting to be connected to an agent. When the Music prompt finishes playing, CCA plays the Hold prompt. The Music and Hold prompts repeat until an agent becomes available. Choose System Default to play 56 seconds of predefined music. For more information on this prompt, see Table 39. **NOTE:** This list box only shows only the custom prompts created in your current login language. For example, if you select English in the login page, log in, and create a custom prompt, log out, and then select Spanish in the login page, and log in again, you will not see your custom prompts. This is because you created the custom prompts while you were logged in using English, and now you are logged in using Spanish. The order in which CCA plays workgroup prompts can be affected by the following features: ■ Allow customer to leave a voicemail ■ Allow customer to request a callback

Setting Workgroup Service Levels

A workgroup service level lets a supervisor monitor whether online and offline interactions are being accepted at a specific rate. For example, the managers of a contact center might want:

- 50% of all online interactions to be accepted by an agent in 1 minute or less.
- 50% of all offline interactions to be accepted by an agent in 3 minutes or less.

For example, if the Online Service Level is 60 seconds and the OffLine Service Level is 180 seconds, then when a supervisor looks at the Service Level Workgroups screen, the supervisor sees the percentage of online and offline interactions (since 12:00:00 A.M. today) meeting those requirements.

For service levels, online and offline interactions are defined as:

- Online interactions include ACD Phone, ACD Voicemail, ACD Callback, Web Callback, and Chat.
- Offline interactions include ACD Fax, ACD Email.

When calculating the service level:

- The time starts when an interaction reaches the contact center.
- The time stops when an agent accepts the interaction.

Therefore, the Service Level Time includes the following:

- The time a customer spends waiting in a queue
- The time the customer spends listening to prompts

To set workgroup service levels

1. Select Options, Workgroups, and then Service Level.
2. From the list box menus, select a service level for online and offline interactions, and then select OK.

Deleting a Workgroup

Delete a workgroup when it is no longer needed. The deleted workgroup is no longer available to receive interactions, but it remains available for reporting in AM Reports.

Before deleting a workgroup, ensure that the workgroup is not in use by checking these areas:

- Remove the workgroup as the routing destination for incoming interactions in all CCA Projects.

  TIP: See "Creating a Project Definition" on page 291.
- Remove the workgroup as a touch-tone option in all project menus.

  TIP: See Workgroup option in the section "Creating Standard Menus" on page 220.
- Remove the workgroup as an action in all campaigns.

To delete a workgroup

1. Select Options and then Workgroups.
2. Select the Workgroup to remove.
3. Select Delete. A confirmation message appears.
4. Select OK.

10 Creating Project Menus

This chapter explains how to create project menus for the following:

- Providing callers choices when navigating your contact center
- Performing prework before delivering a call to an agent
- Handling an interaction without the need for agent intervention

This chapter includes the following topics:

NOTE: Project menus (phone menus) are not required in a basic contact center.

About Project Menu Types

When you add a new project menu, you will see on the Project Menus screen that you can select from five menu types.

Each menu type has a different purpose. Most contact centers use all, or nearly all, of the menu types to accomplish some overall goal. See Table 46 for description of each project menu type.

Table 46. Project Menu Types and Descriptions

Menu Type	Description
Standard	Use for general purpose call routing. You can route calls to many different locations, including agents, workgroups, projects, and other menus. This menu type supports variables and a case-like data structure.
Get Digits	Use to capture data that a caller has entered in a variable. This menu also supports the same routing features and a case-like data structure as a standard menu.
Play Value	Use to play a prompt or a value (the contents of a variable) to the caller. This menu also supports the same routing features and a case-like data structure as a standard menu.
SQL Query	Use to run an SQL query against almost any database. You can include project menu variables in your SQL query, and you can capture the SQL Result Table in a project menu variable. This menu also supports the same routing features and case-like data structure as a standard menu.
Record	Use to record a caller for the time you specify. Then, you can listen to the recording later. This menu also supports the same routing features and case-like data structure as a standard menu.

Think of menu types as building blocks for constructing features or routing solutions in your contact center. See Table 47 for an example of how you can use menus to provide a customer with the account balance without using agent intervention.

Table 47. Customer Action and Call Center Response

Customer Action	Contact Center
A customer calls the contact center.	The customer calls a phone number associated with a project. The project routes the call to a Play Value menu.
The caller is asked to enter an account number.	The Play Value menu plays a prompt such as, *Welcome to the contact center. Please enter your account number.* Then the Play Value menu routes the call to a Get Digits menu.
The caller enters the account number.	The Get Digits menu captures the customer's account number in a variable and routes to an SQL Query menu.
(No action).	The SQL Query menu queries a database, using the customer's account number to find the customer's account balance. The customer's balance is stored in a variable, and the call is routed to a Play Value menu.

Table 47. Customer Action and Call Center Response

Customer Action	Contact Center
(No action).	The Play Value menu plays a prompt, such as *Your current balance is* and then routes the call to another Play Value menu.
(No action).	The last Play Value menu reads the value of the account balance variable to the customer, for example, *four hundred and twenty three dollars.*

As shown in the example (Table 47), each menu accomplishes only a small part of the overall goal, which is to give the customer the account balance. The advantage of this design is that you can combine menus to create a wide variety of sophisticated features.

Using Variables in Menus

AM has user-defined variables and system variables. You can use both in each menu type to:

- Share values between Project Menus
- Collect and store values that customers enter in a menu
- Add values to and trap values coming back from, an SQL query

User-Defined Variables

Create user-defined variables to store values, capture customer entries, and share values between menus. These are variables unique to your contact center.

Creating User-Defined Variables

You can create and access variables in any of the five menu types. Each menu type provides several locations to enter the variable name. After entering a name, you do not need to do anything else to initialize the variable. For example, when you create a Get Digits menu, you can create a variable by entering the variable name in the Result Stored in Variable field (Figure 16).

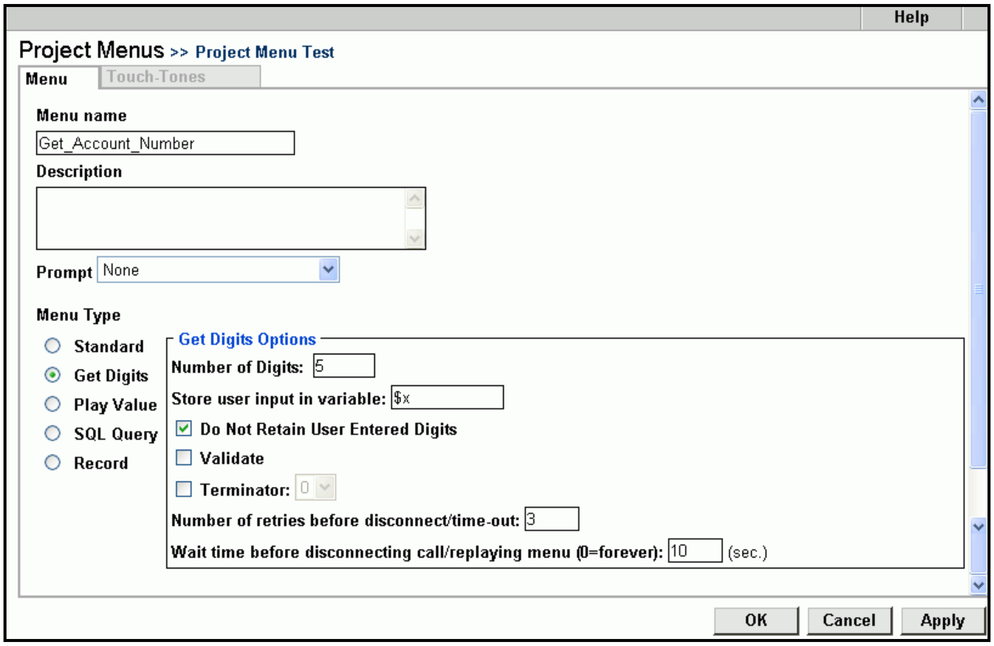


Figure 16. A Get Digits Menu

All variable names must begin with a dollar sign ($), for example:

`$custPhone`

`$projectName`

CAUTION: Variable names are case sensitive. So, `$custPhone` is not the same variable as `$CustPhone`.

Identifying User-Defined Variable Types

CCA can handle variables as either integers or strings. For the system to treat a variable as a string, however, you must encase it with single quotes. For example, CCA treats *'$AccNum'* as a string and *$AccNum* as an integer.

About the Scope of User-Defined Variables

The scope of a user-defined variable is the interaction. When CCA creates a variable during a call, the variable continues to exist for the life of the call. When the call ends, CCA erases the variable from memory.

NOTE: You can share variables between menus, but only for the same interaction.

Consider the following examples:

- If CCA routes a call from one menu to another, CCA creates a variable in the first menu, which is available to the second menu.
- If two calls reach the contact center at the same time, CCA routes both calls to a project menu. The project menu creates a variable called `$Account_Number`. Since there are two interactions, CCA keeps the value of `$Account_Number` for the first interaction separate from the value of `$Account_Number` for the second call.

Length of a User-Defined Variable Name

Theoretically, variable names can be any length. However, because CCA can pass variables between different data systems, it is best to keep the variable names reasonably short. For example, you can include variables in SQL queries, but since databases can vary on their maximum query length, a long variable name may result in an error message.

System Variables

In addition to creating your own variables, CCA also provides many system variables you can use. System variables have values that are automatically set. See Table 48 for a description of the system variables.

Table 48. System Variables and Descriptions

System Variables	Description
$ACD_PRIORITY	Initially this variable is set to the priority of the Project, which is set in the Priority list box under Options, Projects, and the Phone tab. If you enable Customer Priority Routing (by checking the Enable Customer Priority Routing check box (in Options, Projects, the Phone tab, and then the Options subtab), the system can change the value of this variable to the customer priority. **TIP:** See “Assigning Priority Levels to Customers” on page 349.
$ANI	The current incoming phone number.

Table 48. System Variables and Descriptions

System Variables	Description
$CID	If your project prompts the customer for the customer ID (enabled from the Options, Projects, the Phone tab, and then the Use Prompt to ask for customer ID check box), the value that the customer enters is stored in the $CID variable. If you do not select the Use Prompt to ask for customer ID check box, the $CID variable remains empty.
$CONVERTDATE	Converts a string YYYYMMDD to second values (seconds or INVALID). This special System Variable lets you convert a date (in the format YYYYMMDD) to a POSIX style format (number of seconds since January 1st, 1970). For example, to convert the date 19900505 (05 May 1990) to the POSIX value for that date, in any project menu location where you can set a variable, enter: *$CONVERTDATE = 19900505* Then, the next time you test or access the value of *$CONVERTDATE*, it will contain the POSIX equivalent of May 5th, 1990.
$CURRENTTIME	Stores the current time in the format HHMM.
$DATE	Current POSIX time in seconds (number of seconds since January 1st, 1970).
$DAYOFWEEK	Day of the week (where 1= Sunday,... 7=Saturday).
$DNIS	The phone number the caller dialed.
$INTDATE	The date and time when the current interaction began. $INTDATE has a POSIX timestamp format (the number of seconds since Midnight, January 1, 1970, UTC/GMT.)
$INTID	The ID of the current interaction.
$PREDCID	The predictive contact ID of the current predictive call.
$SQLSTATUS	The status of the last query executed from an SQL Query project menu. The possible values are: ■ FAIL ■ NO-ROWS ■ PENDING ■ SUCCESS **TIP:** See “Creating SQL Query Menus” on page 236.
$TODAYSDATE	Stores the current date in the format YYYYMMDD.

Operators

Operators allow you to manipulate variables in a project menu. There are:

- Numeric and string operators
- Comparison operators

See Table 49 for a description of various numeric and string operators.

Table 49. Numeric and String Operators and Their Descriptions

Operators	Description
Numeric Operators	
+	Add values.
-	Subtract values.
*	Multiply values.
/	Divide values.
String Operators	
+	Concatenate strings.

CAUTION: You can use numeric and string operators in any menu location except the Case tab. For more information, see "Defining Routing Actions" on page 231.

Use Comparison Operators (also called logical or test operators) to test conditions, such as "is variable A equal to variable B?" See Table 50 for a list of Comparison Operators and their descriptions.

NOTE: One of the most common errors is to confuse the assignment operator (=) with the comparison operator (==). These operators have a similar appearance, but have different meanings.

$Balance=5	Assign the variable $Balance the value of 5.
$Balance==5	Compare the value of $Balance to 5. (Is the value of $Balance equal to 5?)

Table 50. Comparison Operators and Descriptions

Comparison Operators	Description
==	Equal to
!=	Not equal

Table 50. Comparison Operators and Descriptions

Comparison Operators	Description
>	Greater than
<	Less than

Creating Standard Menus

Standard menus allow callers to navigate to your contact center by pressing keys on their phone. Standard Menus can also route callers, based on predefined decisions.

A standard menu has three parts:

- A prompt (recorded message) that describes the valid touch-tone menu choices
- The tones that the customer can enter
- The CCA response to each valid tone

A standard menu can route calls to many destinations, including:

- A Workgroup for handling by the next available Agent
- A specific Agent
- A company directory based on Agent last names
- Other menus with additional options

To create a Standard Menu

1. From the AM Navigation Plane, click Options, Project Menus, and then Add. The Project Menus screen opens to the Menu tab.
2. In the Menu tab, click Standard.
3. Use the information in the following table to complete the fields in the Menu tab:

Field	Description
Menu Name	Type a name for the menu.
Description	Type the menu's function or purpose.
Prompt	Select the prompt from the list box that describes the options offered in this menu. If the correct prompt does not appear, you must record it and add it to the Prompt Library. **TIP:** See "Process of Creating a Custom Prompt" on page 154.
Allow caller to select extension	Select this option to allow the caller to enter an agent's extension. Also select the Allow Type-ahead check box, so that the customer can type an agent's extension, without listening to the entire menu.

Field	Description
Allow type-ahead	Check so that the caller can choose the menu options before the prompt completes playing.
Number of retries before disconnect/ timeout	Type the number of times to play the menu before disconnecting the caller or jumping to the Timeout Action button.
Wait Time before replaying menu	Type the number of seconds to wait before replaying the menu, if the caller does not make a choice.

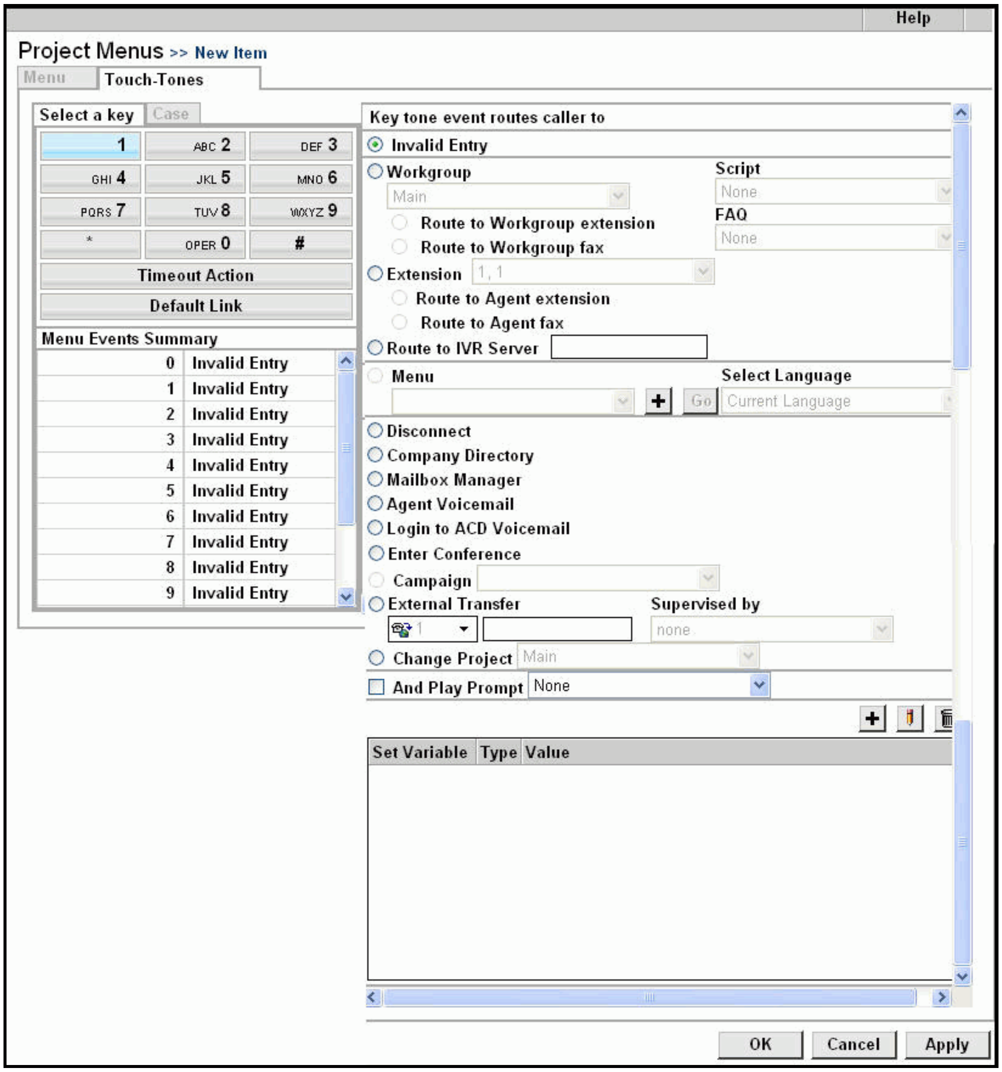
4 Click the Touch-Tones tab, where you associate a customer keypress with a routing action:

a Select one of the buttons on the left side of the tab (such as buttons 1-9, *, #, and so forth). Then, select one of the buttons on the right side of the tab.

For example, click button 9 on the left side, and then click Disconnect on the right side. If the user presses 9 on the phone, CCA disconnects the user.

b Click the Timeout Action button so that CCA will perform a specific action if the caller does not make a choice from the menu. CCA will perform the specified action after the menu is repeated the number of times you specify.

c Click the Default Link button to take an action (after a prompt plays, if one exits) without giving the caller an opportunity to select from a menu. This action occurs as soon as the caller reaches this menu.



5 Use the information in the following table to create your own tone and event routing:

Tone/Event Routes Caller to	Description
Invalid Entry	Select to play the System Prompt invalid.wav (Invalid Entry).
Workgroup	Select to route the caller to the workgroup specified in the list box. Then, click either: ■ Route to Workgroup extension. Select to transfer the call to the best available agent. If no agent is available, CCA places the caller in a queue. ■ Route to Workgroup Fax. In this case the customer is waiting to send a fax to the contact center. Your menu prompt might say something like: *Press 3 to send a fax.* Then, when the user presses 3 (for example), the fax tone becomes audible and the user can send a fax. CCA routes the fax to the best available agent. If no agent is available, CCA places the fax in a queue. When an agent accepts the fax interaction, CCA sends the agent an email with the fax as a TIFF attachment.
Script	Choose a script to display to the agent whenever CCA routes a call to that agent. **TIP:** See "Creating a URL Library" on page 150.
FAQ	Choose an FAQ to display to the agent whenever CCA routes a call to that agent. **TIP:** See "Creating a Fax Library" on page 125.
Extension	Select to route the caller to the agent specified in the list box. Then select one of the following: ■ Route to Agent Extension (to route a call to the agent) ■ Route to Agent Fax (to route a fax interaction to the agent). In this case, the customer wants to send a fax to a specific agent. The selected agent immediately receives an email with the fax as a TIFF attachment.
Route to IVR Server	Select to transfer the caller to your custom Interactive Voice Response (IVR) system. Type the name of your IVR Server in the text box. **NOTE:** This option appears only if your version of CCA is configured to support a custom IVR Server.

Tone / Event Routes Caller to	**Description**
Menu	Use this option to transfer your caller to another project menu: ■ Select the project menu from the Menu drop-down list. ■ Select a language from the Select Language drop-down list. ■ If you are routing your customer to a menu in the same language as the previous menu, choose Current Language from the Select Language drop-down list. ■ If you are routing the customer to a menu in a different language, choose that language in the Select Language drop-down list.
	Click Plus to quickly add a new project menu without leaving the Touch Tones tab. **TIP:** See "Adding a New Project Menu in the Touch Tones Tab" on page 227.
	Click Go to quickly switch from one project menu to another: **TIP:** See "Switching From One Project Menu to Another in the Touch Tones Tab" on page 227.
Disconnect	Select to disconnect the caller.
Company Directory	Select to play the prompt entername.wav: *Please enter the last name of the person you wish to reach using your touch-tone telephone keypad...* This feature also allows the caller to navigate to an agent by entering the first three letters of the agent's last name.

Tone / Event Routes Caller to	Description
Mailbox Manager	Select to play the following prompt entermailbox.wav and allow contact center agents to access their non-ACD voicemail messages from a remote telephone and to set up their voicemail greetings: *Please enter your mailbox number, followed by the pound key.* For agents to access the Mailbox Manager remotely: ■ The agent's user name and password must consist only of numbers. For example, the agent's user name could be 1234 and their password could be 5678. **TIP:** Options, Agents, Profile ■ You must have a POP3 server configured for the agent. **TIP:** Options, Agents, Email, Defined POP3 Server. ■ You must have a project that uses a project menu (phone menu) and there must be a touch-tone key that routes to the Mailbox Manager button. ■ You can also allow users to access their ACD voicemail messages. If you do not want customers to access the Mailbox Manager feature, leave it out of your recorded prompt. Tell your agents that they can enter a key to access their voicemail messages, but the feature will not be described as an option in the recorded prompt. **TIP:** See Login to ACD Voicemail on page 226.
Agent Voicemail	Select so that CCA will only play your menu before routing a customer to an agent's voicemail.For example, if he customer calls a phone number associated with a project, CCA will route the customer to an agent. However, if the agent is not available, CCA will route the customer to the agent's voicemail. With this option selected, CCA plays a menu before the customer can leave a voicemail. The menu, for example, can instruct the customer to press a specific key to allow the customer to leave a voicemail for the desired agent. **NOTE:** If you use the Agent Voicemail button in a menu that is not played for a customer before the customer leaves a voicemail, the system cannot determine which agent voicemail to use.

Tone / Event Routes Caller to	Description
Login to ACD Voicemail	Select this option to allow agents, supervisors, administrators, and other users of CCA, to dial in to the system and retrieve their ACD voicemail: ■ Users dial the number you provide. ■ Your project menu routes the user to the Login to ACD Voicemail option. ■ CCA plays a prompt giving the users several options; one of which is to listen to their ACD voicemails. **NOTE:** Use this option for agents, supervisors, administrators, and anyone using CCA to retrieve their ACD voicemails from a phone. Typically, users are not logged in to IM. The user's log in name and password must consist only of numbers. For example, an agent's user name could be *1234* and their password could be *5678.* **TIP:** Options, Agents, Profile You can also allow users to access their non-ACD voicemail messages. **TIP:** See "Mailbox Manager" on page 225
Campaign	Select to route a call to a campaign. **TIP:** See Chapter 11, "Campaign Overview.".
External Transfer	Select to transfer the call to the specified external phone number. **NOTE:** You cannot use an internal phone number or extension. CCA does not track calls that are transferred to an external number. This call will not appear in reports.
Change Project	Select to route the caller to the specified project.
And Play Prompt	Click and select a prompt (from the drop-down list) so that CCA will play a prompt before taking any routing action. For example, if you select Change Project, then use this prompt to tell users, "I am transferring you to the sales group." Users hear this before CCA routes the call.
Set Variable	Use the Set Variable control to perform these actions before CCA routes the call: ■ Create variables. ■ Set the value of the new and existing variables. ■ Test the value of the variables.

6 Repeat steps 4 and 5 until you have set actions for all of the allowed keypresses, and click OK.

Adding a New Project Menu in the Touch Tones Tab

While in the Touch-Tone tab, you can add a new Project Menu without using the Project Menu option, by following these steps:

To add a new project menu in the Touch Tones tab

1. In the Touch-Tone tab, click the plus icon. A message box appears.
2. In the Menu Name text box, type the name of a new Project Menu and then click the Add button. AM creates a new Project Menu with the name you entered. The new Project Menu is automatically selected in the Menu drop-down list and has the following default values:
   - Prompt = None
   - Menu Type = Standard
   - Number of Retries Before Disconnect = 3
   - Wait Time Before Disconnecting = 10 seconds

Switching From One Project Menu to Another in the Touch Tones Tab

While in the Touch-Tone tab, you can switch from one Project Menu to another by following these steps:

To switch from one project menu to another in the Touch Tones tab

1. Select a menu from the Menu drop-down list.
2. Click Go. A message box appears asking for confirmation to go to the selected menu.
3. Click OK. AM does the following:
   - Closes your current project menu
   - Opens the project menu you choose
4. You must save your changes before clicking Go, or your changes will be lost.

Using the Set Variable Control

Use the Set Variable Control to create variables, assign values to variables, and test variables:

- In the Set Variable control, you can create as many entries as you want. CCA makes all of the assignments and tests that you create before routing the interaction.
- All operators in the Set Variable control (string, numeric, and comparison) are available.
- Create equations and perform math operations, using new variables, existing variables, and system variables.

Example 1: Creating a Variable and Setting Its Value to 5

To create a variable and set its value to 5

1 Click Plus.

2 In the Set Variable dialog box, type `$tmp`.

3 Click Value and enter 5, and then click OK.

NOTE: Follow the same steps to assign a string value to the variable `$tmp`.

Example 2: Incrementing a Preexisting Variable

In this example, assume that there is a preexisting integer variable (`$tmp`) that was created in some other menu.

To increment a preexisting variable

1 Click Plus.

2 In the Set Variable dialog box and type `$tmp`.

3 Click Value and type `$tmp + 1`, and click OK.

Example 3: Assigning a Company Prompt ID to a Variable

There are some situations, when you are constructing a menu system, where it is convenient to store the ID number of a company prompt in a variable. When you have the ID of a Company Prompt in a variable, you can route an inbound call to a Play Value menu and play the prompt to the caller.

NOTE: You cannot store the ID of a System Prompt in a variable.

In this example, assume that a Company Prompt called *Invalid Entry* exists.

To assign a company prompt ID to a variable

1 In the Set Variable control, click Plus.

2 In the Set Variable dialog box, type `$invalid`.

3 Click Play Prompt.

4 Select Invalid Entry from the Play Prompt drop-down list, and click OK.

5 After assigning the ID of a Company Prompt to a variable, play that prompt to a caller by routing to a Play Value menu and then entering your variable (`$invalid`) in the Add Play Value dialog box.

Example 4: Routing the Customer to a Menu in a Different Language

In this example, customers who reach the contact center will hear a prompt that allows them to continue in English or Spanish. If they choose to continue in English, CCA routes them to an English-speaking workgroup. If they choose to continue in Spanish, CCA routes them to a Spanish-speaking workgroup.

To route the customer to a menu in a different language

1. Create a Spanish-speaking workgroup and an English-speaking workgroup.
2. Create a Company Prompt, *Press 1 for English. Seleccionar dos para Espanol*.
3. Create a Spanish project menu:
   a. In the Menu tab, click Standard.
   b. In the Touch-Tone tab, click the Default Link button, click the Workgroup button, and then select the Spanish workgroup from the drop-down list.

   CCA immediately transfers any customer who is routed to the Spanish menu to your Spanish workgroup.
4. Create an English menu:
   a. In the Menu tab, select the Company Prompt you created from the Prompt drop-down list, and click the Standard button.
   b. In the Touch-Tone tab, click 1, click the Workgroup button, and then select the English Workgroup from the drop-down list.

      CCA immediately transfers a customer who presses 1 to the English workgroup.
   c. In the Touch-Tone tab, click button 2, click the Menu button, select the Spanish Menu from the drop-down list and then select Spanish from the Select Language drop-down list.

      CCA immediately transfers a customer who presses 2 to the Spanish workgroup. All further prompts that the customer hears (for example, if they are waiting in a queue) will be in Spanish.
5. Create a project, and route phone calls to the English Menu:

- Select Options, Projects, Phone tab, click the Menu button, and then select the English menu from the drop-down list.

  CCA routes callers to the project on the English menu. The English menu gives them the choice of continuing in English or Spanish.

NOTE: When you route callers to a menu in another language, make sure that you have System Prompts for all Project Options and all Workgroup Options recorded in that language.

NOTE: If you select a menu in a specific language and you do not have prompts in that language, callers will hear silence when they reach that menu.

TIP: See “Process of Creating a Custom Prompt” on page 154 for information on creating prompts.

About the Case Tab

Use the Touch-Tones tab to take a routing action when a customer presses a key on a phone. You can use the Case tab to take a routing action based on the value of one or more variables:

If (condition) then (take a routing action)

The Case tab is named after the case (or switch) statement that is common in many programming languages. However, in AM, this tab works more like an IF ... THEN ... ELSE... statement. The following options are available:

- **Access to variables.** In the Case tab, you have access to all system variables and all variables that you have created for the current interaction.

  TIP: See “Using Variables in Menus” on page 215 and “About the Scope of User-Defined Variables” on page 217.

- **Number of conditions.** You can create as many conditions or tests as you want. CCA executes the first condition that is true.

- **Default routing action.** You can create a default routing action (using the Other button). This is the routing action that CCA takes if none of your conditions are true.

- **Use of operators.** The conditions that you create must use only the comparison (logical) operators.

  TIP: See “Operators” on page 219.

CAUTION: Do not use any of the numeric or string operators in the Case tab, since it is not used for arithmetic operations, like: `$variable1 * $variable2` or for setting the value of a variable: `$variable1 = 5`

The Case tab is used only for testing, or comparing values:

Is today Sunday?

`$DAYOFWEEK == 1`

(`$DAYOFWEEK` is a system variable)

Is the customer balance less than the minimum balance?

`$cust_balance < $min_balance`

(The variables *`$cust_balance`* and *`$min_balance`* are examples of user defined variables.)

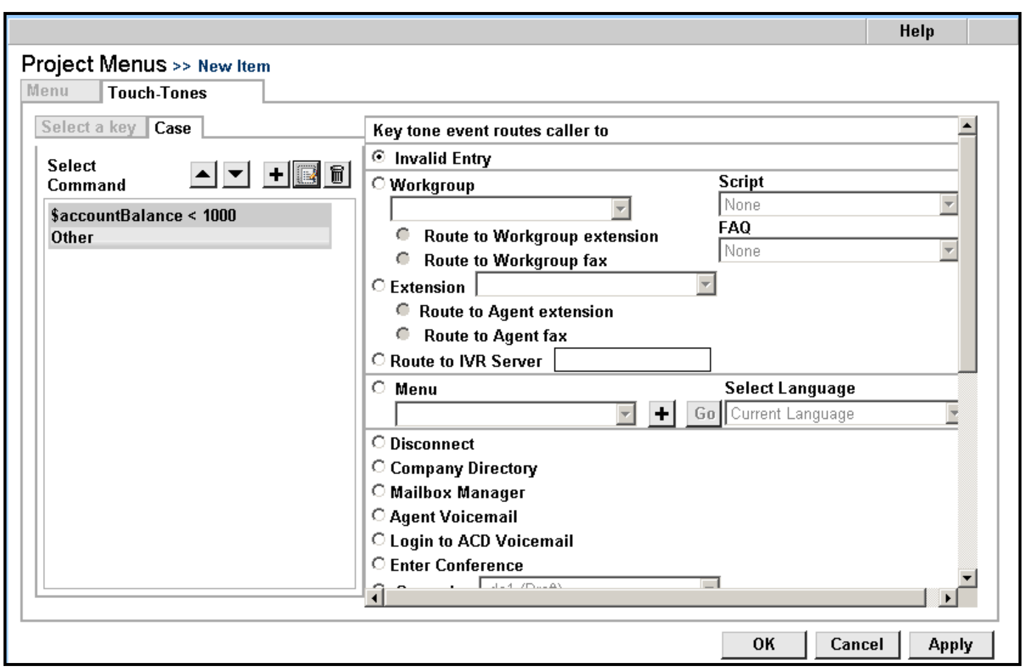
Defining Routing Actions

Define routing actions in project menus through the Touch-Tones tab and Case subtab.

To define routing actions

1. Click Options, Project Menus, Add, the Touch-Tones tab, and then the Case tab. The Case tab screen opens.
2. Click Plus to add your condition or test.
3. In the dialog box that appears, type your condition, and click OK.

   The screen refreshes showing additional options.



4 On the right side of the screen, select a routing action that CCA takes when your condition is true.

In this example, you create a condition/test that checks the customer's account balance. The variable *$acccountBalance* was created, and the value set in some other menu.

First, you create the condition/test *$accountBalance < 1000*. Then, select a routing action for that condition. When the customer's account balance is less than $1000.00, CCA will route the call to a menu called, Balance Too Low. This menu might tell the customer that the balance is below $1000.00 and that a service fee be charged.

5 Repeat Step 3 and Step 4 until you have added all of the conditions and routing actions.

6 As an option, you can create a default routing condition that CCA executes if none of your other conditions is true:

a Click Other.

b Select a routing condition from the right side of the screen.

Creating Get Digits Menus

Use a Get Digit menu to prompt the caller to enter a value, and then capture that value in a variable.

To create a Digits Menu

1 Click Options, Project Menus, and then Add.

2 In the Menu tab, click Get Digits.

3 Use the information in the following table to complete the fields:

Field	Description
Menu Name	Enter a name for this menu.
Description	Enter a description for this menu (the menu's function or purpose).
Prompt	Select the prompt from the list box that describes the options offered in this menu. If the correct prompt does not appear in the list box, you must record it and add it to the Prompt Library. **TIP:** See "Process of Creating a Custom Prompt" on page 154.
Number of Digits	The number of digits to be entered by the caller **NOTE:** This number includes any terminator that you might ask the customer to enter; for example, "Enter your account number; then press the # key."
Store User Input in Variable	The variable name in which to store the digits that the caller enters. **TIP:** See "User-Defined Variables" on page 215.
Do Not Retain User Entered Digits	If unchecked, CCA will keep the numbers that the user enters in input Variables (identified in the Store User Input in Variable field above).

Field	Description
Validate	Select this option to have the callers input read back to them so that they can verify that it is correct. The caller can select 1 for approval or 2 to re-enter the data.
Terminator	Select this option to allow the caller to enter a terminating key. A terminating key is a way that the caller can tell the system: *I have finished entering the information you asked for.* For example, you might ask the caller to enter their account number and then press the number sign (#) key as a terminator. A terminator is useful if the caller's information might be of different lengths. For example, some account numbers are longer than others.
Number or retries before disconnect/ time-out	Enter the number of times that the menu prompt is replayed before the call is disconnected.
Wait time before replaying menu	The amount of time in seconds that the system waits before replaying the menu prompt.

4 Create your routing actions using either the Touch-Tones tab or the Case tab, and click OK.

TIP: See "Creating Standard Menus" on page 220 to learn more about the Touch-Tones tab.

TIP: See "Defining Routing Actions" on page 231 to learn more about the Case tab.

Creating Play Value Menus

Use a Play Value menu to play a prompt to the caller or read the contents of a variable to the caller.

To create a Play Value Menu

1 Click Options, project Menus, and then Add.

2 In the Menu tab, click Play.

3 Use the information in the following table to complete the fields on the Menu tab:

Field	Description
Menu Name	Type a name for this menu.
Description	Type the menu's function or purpose.
Prompt	Select the prompt from the drop-down list that describes the options offered in this menu. **NOTE:** If the correct prompt does not appear in the list box, you must record it, and add it to the Prompt Library. **TIP:** See "Process of Creating a Custom Prompt" on page 154.

4 Add the Play Value Options. The Play Value Options area is where you select the prompts or values to play to the customer.

a Click Plus. The Add Play a Prompt or Value dialog box appears.

5 To play a prompt to the caller:

a Click Prompt.

b Select the prompt from the Select Prompt drop-down list.

NOTE: You can only play company prompts to callers. You cannot play system prompts.

TIP: See “Overview of Custom Company Prompts” on page 154 for information about creating Company Prompts.

6 To play a value (the contents of a variable):

a Click Value.

b In the Select the Variable text box, type the name of the variable whose value you want to play.

NOTE: The variable that you select must have been created and given a value in some other menu. You must know a variable’s scope.

TIP: See “Using the Set Variable Control” on page 227.

c From the As drop-down list, choose the way the caller hears the value, see the following table.

Value	What Callers Hear
Currency	If the value of your variable is 12345, the caller hears: *One hundred twenty three dollars and forty-five cents.*
Number	If the value of your variable is 12345, the caller hears: *Twelve thousand three hundred and forty-five.*
Spelling	If the value of your variable is 12345, the caller hears: *One, two, three, four, five.*
Date (yyyymmdd)	If the value of your variable is 20040710, the caller hears: *July 10, two-thousand and four*. **NOTE:** It is assumed that the variable is a date in the format yyyymmdd.
Date (seconds since 1970)	If the value of your variable is 20040710, the caller hears “Aug 21, nineteen seventy.” **NOTE:** It is assumed that the variable has a POSIX formatted date (number of seconds since 1970).
Date at Time	Same as the preceding row, but also tells the caller the time.
Time (seconds since 1970)	If the value of your variable contains the POSIX equivalent of 10:35 A.M., the caller hears “Ten thirty-five, A.M.” **NOTE:** It is assumed that the variable contains a POSIX time value.
Time (hhmm)	If the value of your variable is 1035, the caller hears “Ten thirty-five, A.M.” **NOTE:** It is assumed that the variable contains a time value in the 24-hour format hhmm.
Prompt	CCA plays the prompt to the caller. **NOTE:** It is assumed that the variable contains the ID of a company prompt. **TIP:** See “Example 2: Incrementing a Preexisting Variable” on page 228.

Note the following points:

- You can play as many prompts or values to the caller as you want.
- You can only play Company Prompts to callers. You cannot play System Prompts.

TIP: See “Creating a Company Prompt Library” on page 92.

7 Create your routing actions using either the Touch-Tones tab or the Case tab, and click OK.

TIP: See "Creating Standard Menus" on page 220 for more information about the Touch-Tones tab.

TIP: See "Defining Routing Actions" on page 231 for more information about the Case tab.

CAUTION: Before creating an SQL Query menu, you must have an ODBC System DSN entry for the database that you want to access. You must create the DSN entry on the machine where the CCA Statistics server is installed.

Creating SQL Query Menus

Use SQL Query menus to run SQL statements against any SQL Server or Oracle database to retrieve or update data. For more information on SQL query menus, see your network administrator:

- You can include both AM system variables and user-defined variables in your SQL queries. CCA substitutes the variables before passing the query to the database server.
- You can capture the Result Table from an SQL query into a user-defined variable.
- You must capitalize all SQL keywords (SELECT, AS, FROM, WHERE, SET, and so on).
- The only table actions that you can perform from an SQL Query menu are SELECT, INSERT, and UPDATE.

When calling stored procedures, you must precede any values used as input to the procedure with a question mark (?) instead of a dollar sign ($).

To create SQL Query Menus

1 In the AM Navigation Pane, click Options, Project Menus, and then Add.

2 In the Menu tab, click SQL Query.

3 Use the information in the following table to complete the fields on the Menu tab:

Field	Description
Menu Name	Type a name for this menu.
Description	Type the menu's function or purpose.
Prompt	Select the prompt from the drop-down list that describes the options offered in this menu. If the correct prompt does not appear in the list, you must record it, and add it to the Prompt Library. **TIP:** See "Process of Creating a Custom Prompt" on page 154.
SQL Query	Enter the SQL Query to run.
Alias	Displays the data source name (supplied by the network administrator).
Username	Displays the data source user name (supplied by the network administrator).
Password	Displays the data source password (supplied by the network administrator).

4 Create your routing actions using either the Touch-Tones tab or the Case tab.

TIP: See "Creating Standard Menus" on page 220 for more information about the Touch-Tones tab.

TIP: See "Defining Routing Actions" on page 231 for more information about the Case tab.

5 Click OK.

Example Query Tables

You can create query tables to pass values to CCA for specific purposes. You can, for example, create a query table to update a customer's status or return the customer's account balance. You can also

Updating a Customer's Status

To collect a customer's status, update an existing table. For example:

- Use the following statement to update a customer's status:

```
UPDATE Customers SET CustStatus = $NewStatus

WHERE CustId = '$CustomerId'
```

CCA treats the value in the '`$CustomerId`' variable as a character string, because it is surrounded by single quotes.

Returning a Customer's Account Balance

To collect and store a customer's account balance, use a table with one row and one column. For example:

- Use the following statement to return the customer's account balance in a variable called `$Balance`:

```
SELECT CustBalance AS $Balance FROM Customers

WHERE CustId = '$CustomerId'
```

Returning Multiple Information Items About a Customer

To collect more than one item of information about a customer, use a table with one row and multiple columns. For example:

- For each column to collect information, you must provide a user-defined variable:

```
SELECT fname AS $fname, lname AS $lname FROM users

WHERE CustId = '$CustomerId'
```

Returning Multiple Items of Information About Multiple Customers

To collect more than one item of information about multiple customers, use a table with multiple rows and multiple columns. For example:

- You have to provide only the variables for the first row. AM will automatically create a set of variables that you can use to access the values in all of the other rows, using a predefined naming pattern. For example, assume your SQL query will return the first and last names of 10 customers.

  ```
  SELECT fname AS $fname, lname AS $lname FROM users

  WHERE CustId <= 10
  ```

- Your result table looks like the following:

Rod	Beck
Adam	Eaton
Miguel	Djeda
Ryan	Klesko
...	...

- AM sees that your result table has multiple rows and automatically creates a set of variables to access the data in each row:

	Variable		Variable
Rod	$fname_1	Beck	$lname_1
Adam	$fname_2	Eaton	$lname_2
Miguel	$fname_3	Ojeda	$lname_3
Ryan	$fname_4	Klesko	$lname_4
...	...	...	...

NOTE: In your SQL query, provide only the variables names for the columns to collect (such as $fname, and $lname). AM automatically creates variables for all other rows.

For example, you can use *$fname_1, $lname_1,* to reference the first and last name in the first row, but you can also use the variables *$fname, $lname.* This only applies to the first row of the Result Table. For all other rows you must use the *$var_<number>* format.

You can use the system variable *$NBROWS* to find the number of rows in your result table.

If you created a loop to examine all rows in the Result Table, you can also see variables using the format:

```
$variable_name@$index_variable
```

In the previous example, you reference Ryan Klesko as:

```
$index = 4
$fname@$index            ("Ryan")
```

`$lname@$index`   (“Klesko”)

Creating Record Menus

Use a Record Menu to record a customer phone interaction, so that the phone interaction can be reviewed later.

To create record menus

1. In the AM Navigation Pane, click Options, Project Menus, and then Add.
2. In the Menu tab, click Record.
3. Use the information in the following table to complete the fields on the Menu tab:

Field	Description
Menu Name	Type a name for this menu.
Description	Type the menu’s function or purpose.
Prompt	Select the prompt from the drop-down list that describes the options offered in this menu. If the correct prompt does not appear in the list, record it, and add it to the Prompt Library. **TIP:** See “Process of Creating a Custom Prompt” on page 154.
Store filename in variable	When your Record menu captures a customer message, CCA stores the message in a .wav file on a CCA server. CCA automatically generates a name for the .wav file, but you can find the name by entering a variable in this text box. For example, you create a Record menu that captures a customer message. CCA stores the message in a .wav file with the generated name `412117512.wav`. In the Store filename in variable text box, enter `$RecordFileName`. After CCA captures the customer’s message, the value of the variable `$RecordFileName` becomes `412117512.wav`. The scope of a variable is the interaction. See “Using Variables in Menus” on page 213.
Validate	If checked, plays the recording back to the customer, and provides the option to listen, rerecord, cancel, or save the message and continue.
Terminator	If you select a terminator, CCA asks the caller to press a button to indicate that the caller has finished the recording. Without a terminator, the recording continues until the caller hangs up or until the maximum recording length is reached.
Maximum recording time	The maximum time recording continues.

4 Create your routing actions using either the Touch-Tones tab or the Case tab.

TIP: See “Creating Standard Menus” on page 220 for more information about the Touch-Tones tab.

TIP: See “Defining Routing Actions” on page 231 for more information about the Case tab.

5 Click OK.

Listening to a Recorded Message

There are two ways to listen to a message already captured by a Record menu.

- **Interaction Manager (IM).** If a contact was assigned to the interaction, the recorded message will appear as a link in the Interaction History for the Contact.

  See the *Contact Center Interaction Manager Guide* for information about assigning contacts.

- **Supervision Manager (SM).** Regardless of whether CCA assigned a contact to the interaction, the recording is always available through the Options, Interaction History screen in SM.

Implementing Your Project Menu

After creating your Project Menu, route inbound callers to your Project Menu using a project. A project controls how the contact center receives and routes interactions.

TIP: See “Process of Adding Phone Interactions to a Project” on page 294.

11 Campaign Overview

This chapter explains the structure and terminology associated with a basic campaign and shows how to access the Campaign Wizard. This chapter includes the following topics:

About Campaigns

Campaigns are call flows. They are based on a hierarchy of Parent and Child nodes. A node is similar to a block in a flowchart:

- Parent nodes contain logic.
- Child nodes contain additional logic, which is executed conditionally, based on the flow of the parent node.

  CCA automatically creates a child Default node when:

  - You set an action on a node.
  - You route to another node.

  CCA creates a child Default node to ensure that, no matter what happens, the call always routes somewhere. The Default node tells the system what to do if none of the conditions are met.

  If you delete a Default node, and the customer does something unexpected, CCA routes the call to the In Case of Any System Error, Go To setting that you select when you create a campaign. (See Step 2 on page 254.)

You create a campaign (call flow) to:

- Give customers access to a large number of options and services.
- Retrieve information from, and present information to, customers.
- Route customers in complex ways, depending on the customer's choices and preferences.

About Node Types

There are three types of nodes:

- **Begin Node.** When you create a new campaign, you always start with the Begin node, which CCA creates automatically. It represents the first event that you want to happen when people reach your campaign. The Begin node is:
  - The parent of all the other nodes in the campaign
  - The entry point into the campaign
  - Every campaign must have a Begin node

  NOTE: The Begin node is the only node that you cannot delete.

- **Menu Type Node** (with no Child nodes). For routing the call flow to existing campaign objects (created in AM) or to existing nodes within the campaign.

  CAUTION: When routing to an object (instead of to another node), the flow moves outside the control of the campaign. Thus, menu type nodes cannot have child nodes.

- **Action Type Node.** For performing an action and then returning to the campaign with values, so that the campaign can perform routing decisions. Use action type nodes to build segments of the call flow, play prompts, gather digits from callers, execute queries, set parameters for workgroups, and so on.

There are three main tasks you can do from a node:

- **Take action.** From an action type node, you can, for example, play a prompt, capture the customer's key presses, run an SQL query, and so on. You can take more than one action in the same node if you want. For example, in one node, ask the customer to enter the account number, capture the number the customer enters, and then verify that the account number exists in your database.
- **Route to a child node if some condition occurs.** From an action type node, for example, if the customer presses 2 to continue in Spanish, you can route to another node that plays a Spanish menu and do further call flow from that menu. Routing to a child node is one way to create new nodes in your campaign.
- **Route to a feature.** From a menu type node, you can send the caller to any node in the current campaign, send the caller to the Begin node of another campaign, and even take the caller out of the current campaign, and route the caller to some other feature of AM (such as a project or workgroup).So, this routing is similar to a powerful GoTo statement in programming.

Defining Menu Routing Conditions

When working with nodes, you can set one of three types of routing conditions:

- **Scheduled Events.** To identify scheduled events, which you create and store in the Business Events Library before you begin creating a campaign.
- **DTMF.** To trap touch-tone entries.
- **Regular Expressions.** To enter specific conditions

About Campaign Types

There are two types of campaigns:

- **Draft Campaign.** A development version for experimentation and testing, without exposing it to the outside world.
- **Deployed Campaign.** A production version, where you take a developed and tested campaign and release it for general use.

Technically, you can make either a draft or a deployed campaign available for public use, because all you need to do is connect the campaign to a project DNIS. However, in practice, you might want to connect your draft campaign to a test phone number, and your deployed campaign to a live commercial phone number.

CCA's Campaign feature has two advantages:

- It has a flowchart-like interface, so that when you create a chart of the call flow, you are creating the system at the same time.
- Most (and in some cases, all) of the parts of the call flow are encapsulated in a single campaign object. You can open one campaign and see all of the Nodes or segments (prompts, options, and routing) for the entire call flow in a single object.

Guidelines on Designing Campaigns

Because campaigns can be lengthy and complex, the best approach is to follow these steps:

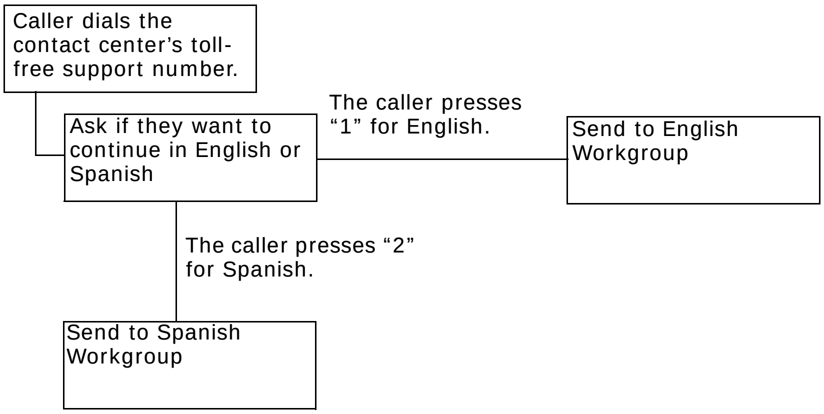
1. Create a call flow diagram. Continue to add additional flow diagrams (or create a series of call flow charts) to illustrate a complex call flow as it moves through the system.
2. Create all of the pieces to support the call flow (including resources, menus, prompts, SQL queries, and so on).
3. Link all of those pieces together to create the campaign, using the Campaign Wizard.
4. Associate (route) your campaign from either a phone project or project menu.
5. Deploy the campaign.

Process of Creating a Sample Call Flow Diagram

This example campaign routes the incoming calls to either an English-Speaking workgroup or to a Spanish-Speaking Workgroup, based on a caller's key press. The sequence of events in the call flow is as follows:

1. Identify the default condition for the campaign, if the action you selected for this step fails.
2. Ask the customer to choose English or Spanish.
3. Capture the customer's entries.

4 Route the call to the correct workgroup (English-Speaking or Spanish-Speaking workgroup). The following figure shows an example call flow for this campaign.



Process of Creating Support Resources

Create support resources and store them in AM's various Libraries.

For this example, do the following:

1 Create a prompt asking the caller to select a language, and store the prompt in the Prompt Library.

2 Create an English-Speaking Workgroup and a Spanish-Speaking Workgroup, where the campaign will direct the calls.

Creating Prompts

Using a recording program, create voice files for the various prompts that you want your caller to hear. The files must be in stored in .wav format on your computer or network. Create the following prompt for this example:

Instructions to choose either English or Spanish, such as: *Please press 1 for English or 2 for Spanish.* After creating the prompt, load it into the Prompt Library.

To create a prompt

1 In the navigation pane of AM, click Libraries, Company Prompts, and then Add. The Company Prompts screen opens.

2 Type a name for the prompt in the Prompt Name text box (such as *Choose English or Spanish*).

The name you enter appears in the prompt list when you set AM to the language supported by this prompt.

3. Click the language in which you already recorded your prompt. For this example, click English (US).
4. In the Description text box, type a description of the prompt. This description appears in the prompt list when you set AM to the language supported by this prompt.
5. Type the filename and path for the prompt (or click Browse to choose the file from your computer or network).
6. (Optional) Click the sound icon to listen to the recording to verify that it is correct.
7. Click OK.

   The Choose English or Spanish prompt appears in the Company Prompt List. CCA stores the new prompts in the CCA database.

Creating Workgroups

Create an English and Spanish Workgroup for this example. Create workgroups using AM.

To create a workgroup

See "Creating a Workgroup" on page 202.

Process of Creating and Deploying Simple Campaign

These are the steps required to create and deploy a simple campaign:

- "Creating a Simple Campaign Using the Campaign Wizard" on page 245.
- "Associating the Campaign with a Project" on page 264.
- "Associating the Campaign with a Project Menu" on page 264.
- "Deploying the Campaign" on page 265.
- "Creating a Draft Campaign from a Deployed Campaign" on page 265.
- "Redeploying the Campaign" on page 265.

Creating a Simple Campaign Using the Campaign Wizard

This example shows how to create a campaign to select a language.

NOTE: Follow the steps in this topic to create this simple campaign. Later, after you create your own company-specific resources, you will know how to insert them into your campaign using the Campaign Wizard.

To create a simple campaign using the Campaign Wizard

1. Log into AM and select Options, Campaign, and then Add. The Java Web Start process begins and, after a few minutes, the Campaign Editor opens the New Campaign Wizard dialog box.
2. Type a name and description for your campaign, and then click Next. The next box opens, where you can identify default actions to take if the customer does something unexpected and, for some reason, a Default node (condition) does not exist. Type a name for the campaign in the Name box.
3. Click Next. The next page of the Campaign Wizard opens.

   NOTE: CCA automatically creates a Default node when you create a campaign.
4. Identify what the system should do when an error occurs; that is, you must identify the default actions to take if the customer performs an unexpected action and, for some reason, a default node (condition) does not exist. For more information on the default fields, see Table 51 on page 247.
   a. Select an item from the Go to the drop-down list.
   b. Select a workgroup from the drop-down list.
   c. If you want to allow the user to type ahead (enter a response without listening to the entire prompt), select the check box.

d Type a number for the default timeout seconds, and click Finish. (The default timeout seconds is the wait time between key presses.)

TIP: See Table 51 for a better understanding of the default fields.

Table 51. Default Fields and Descriptions

Fields	Description
In Case of Any System Error, Go To:	Set up the routing condition for the campaign to execute when a system error occurs. For example, a system error occurs when the campaign cannot take any other routing action. If one node is configured to route to another node, and the second node was deleted, a system error occurs and the campaign executes the routing action you select. You can route system errors to one of the following areas: ■ Workgroup ■ Workgroup Voicemail ■ User ■ User Voicemail ■ Disconnect
Allow Type Ahead	If you have a node (anywhere in the campaign) that plays a prompt and then traps the user’s key press with a Get User Digit or Get DTMF action, the user can enter a response without listening to the entire prompt. **TIP:** See “Get User Digit” on page 256. **TIP:** See “Get DTMF” on page 261.
Enter Digit Timeout	This option applies to any place in your campaign where you ask the customer to enter multiple key presses. The Enter Digit Timeout is the wait time between key presses. When the timeout is reached, the campaign moves on to the next action (which could be validating the customer’s entry, making a routing decision, and so on).

The Campaign Wizard Main Menu opens, showing a Begin node.

A node is like a block in a flowchart. When you create a new campaign, you always start with the Begin node, which CCA creates automatically. It represents the first event that you want to happen when people reach your campaign.

NOTE: The *Begin* node is the only node that you cannot delete.

You can perform three actions from a node:

- **Take action.** You can, for example, play a prompt, capture the customer's keypresses, run an SQL query, and so on.

  You can take more than one action in the same node if you want. For example, in one node, ask the customer to enter the account number, capture the number entered, and then verify that the account number exists in your database.

  TIP: "Adding Actions to Nodes" on page 284 explains actions in detail.

- **Route to a child node.** Only if some conditions occur. For example, if the customer presses 2 to continue in Spanish, you can route to another node that plays a Spanish menu and do a further call flow from there. Routing to a child node is one way to create new nodes in your campaign.

  TIP: "Adding a Menu Routing Condition" on page 285 explains conditional routing in detail.

- **Route to a feature.** You can send the caller to any node in the current campaign, send the caller to the Begin node of another campaign, and even take the caller out of the current campaign, and route the caller to some other feature of AM (such as a project or workgroup). So, this routing is similar to a powerful GoTo statement in programming.

  TIP: "About Menu Type Routing" on page 284 explains routing in more detail.

5 Set an action:

   a Right-click the Begin node box (which is surrounded by a red outline). A menu appears.

   b From the menu, select Set Action Menu. The Set Action menu opens.

   You can set many actions for a node. For more information on adding actions to nodes, see "Adding Actions to Nodes" on page 284.

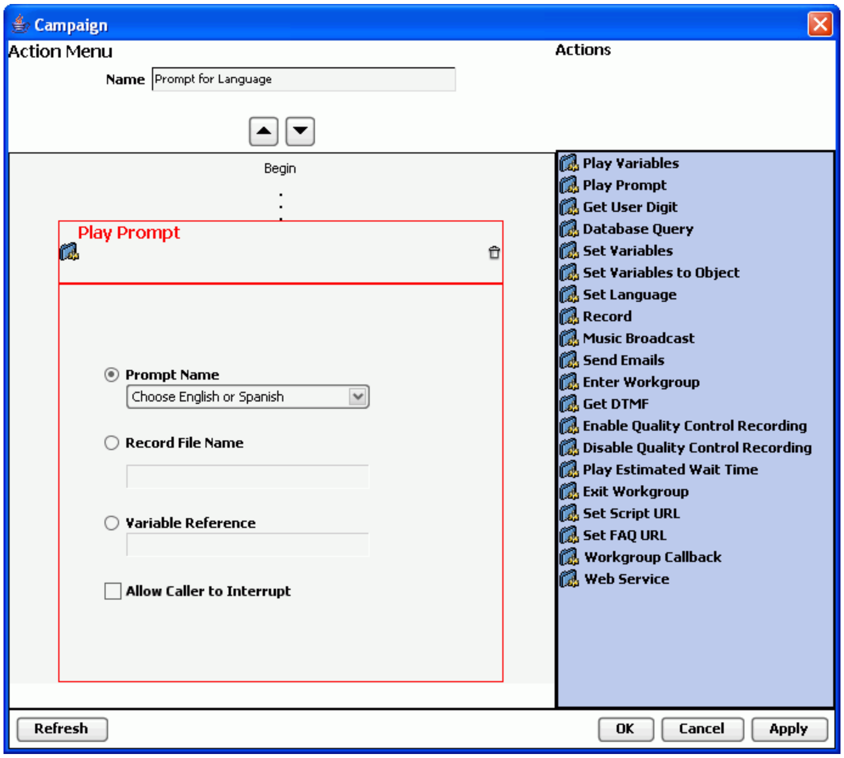
6 Add a Play Prompt action (and assume you have already created the following company prompt: *Press 1 to continue in English. Press 2 to continue in Spanish*):

   a In the Name box, type a name for this action, for example, type Prompt for Language.

   b From the right Actions list, click and drag Play Prompt to the Begin display area (identified by a slightly gray background).

   An action window opens for Play Prompt.

c Double-click the action window to expand it and show more action options.



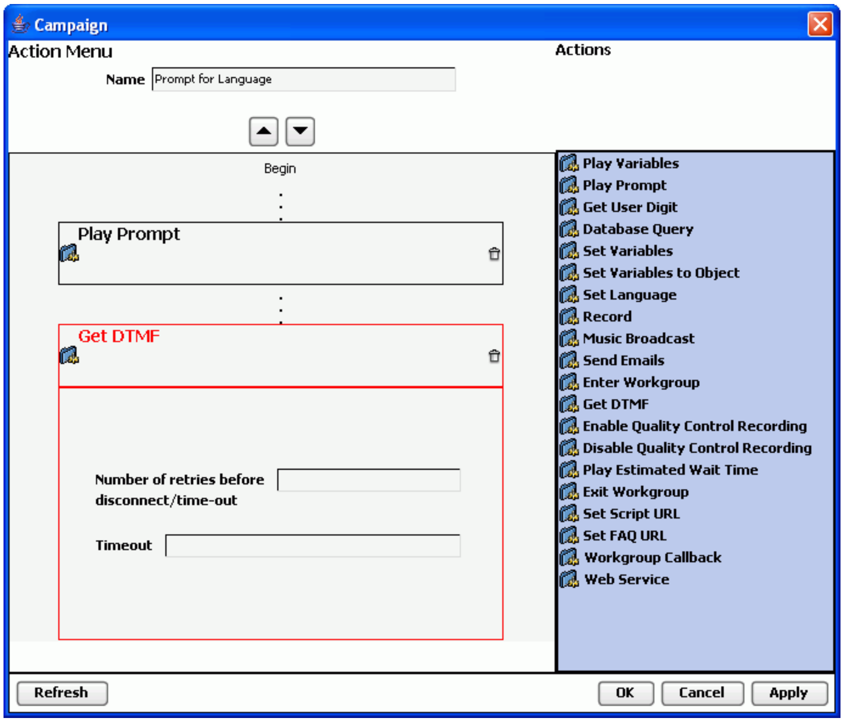
d From the Prompt Name drop-down list, select Choose English or Spanish.

NOTE: For this example, you already created a *Choose English or Spanish* prompt (wav file). You will not see any prompts in your list, however, unless you already created and added prompts to the Company Prompt Library.

TIP: See “Overview of Custom Company Prompts” on page 154.

e Double-click the Play Prompt window to contract, so that the options no longer appear.

7 Capture the data that a caller enters when selecting a language and store it in a variable. In this example, you want to capture either 1 (for English) or 2 (for Spanish). So, drag the Get DTMF action to the top of the display area, and double-click the window to show its options.



8 Do one of the following:

- If the caller does not select 1 or 2, then you allow the caller to reenter the selection once before you disconnect the call. So, in the Number of retries before disconnect/time-out box, type 1.
- If the caller does not select 1 or 2 within 5 seconds, you disconnect the call. So, in the Timeout (seconds) box, type 5, and click OK.

  TIP: See "Get Digits" on page 214 for more about this action.

The Action Menu window closes and the main campaign window becomes accessible again. Notice that *Prompt for Languages* appears in the Begin node. Also, notice that there is a child node called *Default*.

9 For this example, set the *Default* node to hang-up if anything unexpected happens.

a Right-click the Default node, and select Set Menu Type from the menu. The Menu Type window opens.

b Use the Menu Type window to route the call to a feature, such as *Disconnect*, and click OK. For this example. Select Disconnect, and then type a description of this choice in the Name field.

TIP: See Chapter 10, “Creating Project Menus” for a description of various menus.

So far, the example campaign consists of a prompt that asks the user to select 1 for English and 2 for Spanish, and a default child node that disconnects the call if anything unexpected happens.

10 Assuming the caller pressed 1 or 2, you must create instructions to route the caller to either the English or Spanish language choice. Do this by routing the caller to a child node (based on the key press that you trapped with the Get DTMF action).

a In the Begin node, next to Prompt for Language, click Plus. The Menu Routing Conditions window opens.

TIP: See “About Using Menu Routing Conditions” on page 285 for more detail about menu routing.

b Click DTMF, which lets you set up the routing conditions, based on a user keypress. The display changes to show keys 1 to 9, *, 0, and #.

c Click buttons 1 and 2 (the instructions to the caller), and then click OK.

11 Configure those new nodes. For this example, configure the keypress 1 node to set the prompt language to English, and the keypress 2 node to set the prompt language to Spanish:

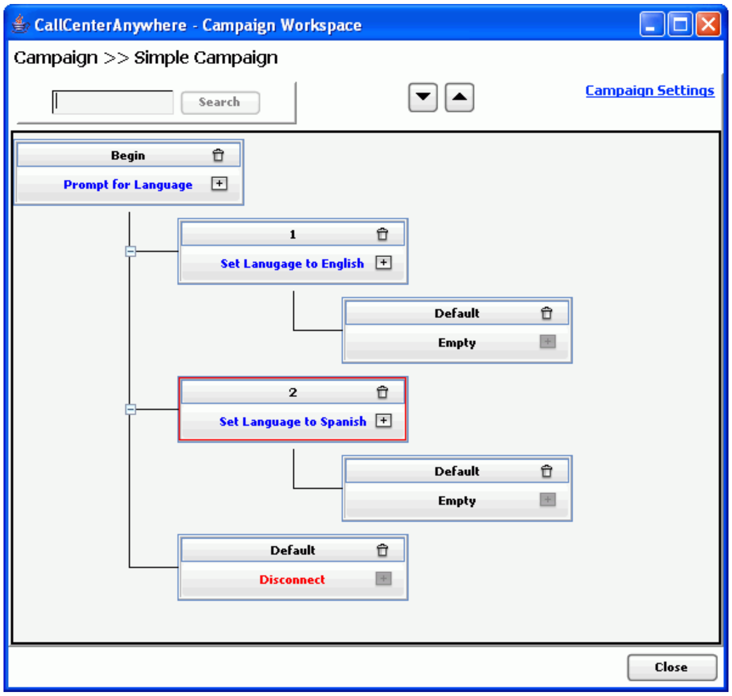
a Right-click the keypress 1 node, and select Set Action Menu from the menu.

b In the Action Menu window, type Set Language to English in the Name box, and then drag the Set Language option into the display area (next to Begin).

c Double-click the Set Language window to expand it, and then select English from the Language drop-down list., and click OK.

d Repeat these steps, starting with Step 11 on page 251, for the keypress 2 node. This time set the language to Spanish.

When you are finished, your campaign window should look like the following:



NOTE: When you set the language in keypress 1 node and keypress 2 node, the campaign feature automatically created a *Default* node for each one. You can delete these extra default nodes, but in a real campaign, you would probably use them to continue routing the call, taking additional actions, and so on.

12 Click Close and Yes (to the confirmation message).

You can tell CCA to route to the campaign from either a phone project or a project menu.

13 Associate (route) the campaign to a phone project or a project menu.

TIP: See "Associating the Campaign with a Project" on page 264 or "Associating the Campaign with a Project Menu" on page 264.

14 Deploy the campaign.

TIP: See "Deploying the Campaign" on page 265.

Selecting a Menu Type

If you want the campaign node to perform a menu type action, select an action from one of the Menu Type selections.

To select a Menu Type

1 Choose Set Menu Type from the submenu of a node.

The Menu Type dialog box opens.

2 Select an action. For more information, see the following table:

Option	Description
Campaign	Route the call to the *Begin* node of any campaign (including the current campaign).
Company Directory	Play the Company Directory navigation prompts, which allow a caller to reach an agent by entering the agent's name.
Disconnect	Immediately disconnect the call.
Existing Menus	Route the call to an existing project menu.
External Number	Route the call to any external number (outside the company). Select a country code, and then enter the complete number. **NOTE:** In the United States, select 1 as the Country Code and then enter a 10-digit number. Other countries have different settings. Check with your supervisor for more information.
Mailbox	Select this option to play the prompt entermailbox.wav, allow contact center agents to access their non-ACD voicemail messages from a remote telephone, and allow agents to set up their voicemail greetings. The entermailbox.wav is: *Please enter your mailbox number, followed by the pound key.* For agents to access the Mailbox Manager remotely: ■ The agent's user name and password must consist only of numbers. For example, the agent's user name is 1234 and the password is 5678. ■ Set user names and password using Options, Agents, Edit (or Add), and then the Profile tab. ■ You must have a POP3 server configured for the agent. ■ To configure a POP3 Server, select Options, Agents, Edit (or Add), Email tab, and then complete the Defined POP3 Server entries. **NOTE:** Leave instructions on how to access the Mailbox Manager out of your recorded message if you do not want customers to hear it. Then, tell your agents to press a key to access their voicemail messages, even though the feature is not an option in the recorded prompt.

Option	Description
Previous Campaign	If the call was routed to the current campaign from another campaign, this option routes the call to the Begin node of the previous campaign. **NOTE:** If there is no previous campaign, a system error occurs and CCA executes your default system error routing decision. **TIP:** See "Changing Campaign Default Settings" on page 265.
Project	Routes the call to an existing project.
User Extension User Fax User Voicemail Workgroup Extension Workgroup Fax Workgroup Voicemail	These six options all work in the same way. You can either select a user or a workgroup name from a drop-down list, or enter a variable assigned to the ID of a user or workgroup. **TIP:** For more about how to use variables, see "About Using Variable Reference Fields" on page 282. **NOTE:** If you use a variable for one of these options, and the variable has no value when it executes, a system error occurs and CCA executes the default system-error routing decision. **TIP:** For more information about creating a default routing decision, see "Changing Campaign Default Settings" on page 265. **NOTE:** You can also route a call to a workgroup from an action. **TIP:** For how to route a call to a workgroup from an action, see "Enter Workgroup" on page 260.
Existing Nodes	Routes the call to any node in the current campaign.

Selecting an Action

If you want the campaign node to perform an action from the Action Menu, select an action from the available selections.

To select an action

1. Choose Set Action Menu from the submenu of a node.

   The Action Menu dialog box opens.

2. Click and drag an option to the Begin gray area.
3. Double-click an action to open its options.
4. Click Delete to delete the action.

   You can add multiple actions and link them together.

5. Use the up and down arrows to change the order of the actions.
6. As you add more actions, use the scroll bar to move up and down the window.

7 Select the options. For more information, see the following table:

Option	Description
Play Variables	■ **Select Variable**: Type the name of the variable whose value will play. **NOTE:** The variable must already exist and have a value. ■ **Select Type**: Choose the way campaign plays the variable value. For example, if the variable value is 12345, then the call hears: ■ **Currency**: *One hundred twenty three dollars and forty-five cents.* ■ **Spelling**: *One, two, three, four, five.* ■ **Number**: *Twelve thousand three hundred and forty-five.* ■ **Date (yyyymmdd)**: If the variable value is 20040710, the caller hears *July 10, two-thousand and four.* (Assumes the variable is in the yyyymmdd format.) ■ **Date (seconds since 1970)**: If the variable value is 20040710, the caller hears *July 10, two-thousand and four.* (Assumes the variable has a POSIX formatted date (number of seconds since 1970). ■ **Date at Time (seconds since 1970)**: Same as the preceding item, but also tells the caller the time. ■ **Time (seconds since 1970)**: If the variable value contains the POSIX equivalent of 10:35 AM, the caller hears *Ten thirty-five, AM.* (Assumes the variable contains a POSIX time value.) ■ **Time (format HHmm)**: If the variable value is 1035, the caller hears *Ten thirty-five, AM.* (Assumes the variable is in the 24-hour format [hhmm].) ■ **Prompt**: Assumes the variable contains the ID of a prompt. See "About Using Variable Reference Fields" on page 282.
Play Prompt	■ **Prompt Name**: From the drop-down list, select the prompt to play. You can only select company (custom) prompts that already exist. You cannot select a system prompt. ■ **Record File Name**: Select and then type the filename to store a recording of the customer's call. ■ **Variable Reference**: Select and then type a variable containing the ID of a custom prompt. See "About Using Variable Reference Fields" on page 282. ■ **Allow Caller to Interrupt**: If you select this check box, the customer can enter a keypress while the prompt is playing and stop the prompt.

Option	Description
Get User Digit	**Number of Digits**: Type the number of digits the caller must enter. **NOTE:** This number includes any terminator that you might ask the customer to enter. For example, if you use *Enter your account number. Then, press the pound key*, you must include the number sign (#) key in your count. **Store User Input in Variable**: Type the variable name that the campaign uses to store the digits that the caller enters. **Validate**: Select this option to have the campaign play the caller's entry back for verification. (Then, the caller can select 1 to approve or 2 to re-enter the data, for example.) **Do not Display in Interaction History:** Check so that the caller's entry will not appear in the Interaction History record. **Terminator**: Select this option to allow the caller to enter a terminating key. Then, select the key from the drop-down list. (A terminating key is a way that the caller can tell the system: *I have finished entering the information you required*.) For example, you might ask the caller to enter the account number and then press the pound (#) key as a terminator. A terminator is useful if the caller's information can be different lengths, as when some account numbers are longer than others. **Number of retries before disconnect/time-out**: Type the number of times the campaign will replay the menu prompt before disconnecting the call. **Wait time before replaying menu**: Type how many seconds the campaign waits before replaying the menu prompt.

Option	Description

Database Query	Select this option to run an SQL query and trap the result in a table. For more information, see "Creating SQL Query Menus" on page 236 for examples showing how to write SQL queries.
	
	NOTE: Before you can use this action, you must create a Database Connection. (A database connection points to a system DSN that you create.) After you create your database connection, select it from the Database Connection drop-down list. Your query runs against the database you select. For more information, see "About Running SQL Queries" on page 284.
	
	■ **SQL Query**: Type the SQL Query that you want the campaign to run.
	■ **Query Result Status Variable**: Type a variable name in this field. After your query runs, the campaign copies the value of $SQLSTATUS to your variable:
	  ■ **FAIL**. The query failed.
	  ■ **NOROWS**. The query did not return any rows of information.
	  ■ **PENDING**. The query did not complete.
	  ■ **SUCCESS**. The query was successful.
	  ■ **TIMEOUT**. The query did not complete and has stopped trying.
	■ **Query Timeout (sec)**: Type how long (in seconds) the campaign waits for the query to return a status. If this timeout is exceeded, the campaign gives your Query Result Status Variable the value of Timeout and will not return a Result table. However, the campaign does not terminate your query.
	■ **Maximum Number of Rows Variable**: Type a variable name. When your query completes, the campaign assigns your variable the number of rows in the Result table.
	■ **Maximum Number of Rows**: Type the maximum number of rows for your Result table.
	NOTE: You cannot enter a value greater than 99.
	■ **Database Connection**: From the drop-down list, select a Database Connection. The campaign runs your query against this database.

Option	Description

Set Variables	Use this option to:
	■ Create and initialize new variables.
	■ Set the value of an existing variable.
	Enter the following:
	■ **Variable**: Type the variable name in the box.
	■ **Value**: Type the value in the box.
	NOTE: You can also use string, numeric, and comparison operators.
	For example:
	`$tmp = 'hello'`
	`$tmp = $tmp1 > $tmp2`
	`$tmp = 1 + $tmp2`

Set Variables to Object	Select this option to assign the ID of a workgroup, user, or prompt to a variable. **TIP:** See "About Using Variable Reference Fields" on page 282. ■ **Select Object Type**: From the drop-down list, select an object type. ■ **Variable**: Type the name of a new or existing variable. ■ **Value**: From the drop-down list, select a specific workgroup, user, or company (custom) prompt.
Set Language	**Language**: From the drop-down list, select a language. From this point forward, the campaign plays all prompts in this language. **NOTE:** Make sure you have all of your prompts recorded in this language. If you are missing any prompts in this language, the customer hears only silence when the prompt ought to be playing.
Record	■ **File Name**: Type the name of the file to save the recording. ■ **Validate**: Select this option to verify that the file exists. ■ **Terminator**: From the drop-down list, select the terminator to use to stop recording. ■ **Maximum recording time**: Type how long (in seconds) to record the caller before the campaign stops recording.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Music Broadcast</td><td>Select this option to play streaming audio (music broadcast) to a caller.

NOTE: You must first create a music broadcast source.

TIP: See “Process of Setting Up a Music Broadcast” on page 156.

■ Select Music Broadcast: From the drop-down list, select an existing music broadcast source.
■ Play For: Click and then type how long (in seconds) to play the music broadcast. When the time ends, the campaign continues to the next action in the current node or to the next node.
■ Allow Caller to Interrupt: Check so that the caller can interrupt the music broadcast at any time by pressing any key. When the caller interrupts the music broadcast, the campaign continues to the next action in the current node or to the next node.

You must do one of the following:

■ Enable the Play For option.
■ Enable the Allow Caller to Interrupt option.
■ Precede the Play Music action with an Enter Workgroup action.

If you do not, the caller is left listening to the music broadcast indefinitely.</td></tr>
<tr><td>Send Emails</td><td>Select this option to send an email to any valid address or email group.

NOTE: Before using this action, you must create at least one SMTP Group. For more information on creating SMTP groups, see “Creating an SMTP Groups Library” on page 148.

■ SMTP Group: From the drop-down list, select an existing group.
■ From: Type an email address (128 characters maximum).
■ To: Type an email address (128 characters maximum).
■ Subject: Type a title for the email (28 characters maximum).
■ Message: Type your email message (2048 characters maximum).
■ Attachment: Choose from the following:
    ■ None (default setting): No attachment to the email.
    ■ Select Fax Library: Select and then, from the drop-down list, select an existing fax from the Fax Library.
    ■ Variable Reference: Select and then type the name of the variable already assigned to the attachment.</td></tr>
</table>

Option	Description
Enter Workgroup	Select this option to route a call to a workgroup and keep the option to bring the caller back to your campaign. (Your campaign makes a request for an available agent, but keeps control over the call until it is accepted by an agent.) **NOTE:** If you use the Menu Type dialog box to route to a workgroup extension, fax, or voicemail, the campaign immediately routes the call to the workgroup, and never returns the call to your campaign. Your campaign node can play music, prompt the customer for more information, and so on. At any time before an agent accepts the call, use the "Exit Workgroup" on page 262 action to return the call to your campaign. **NOTE:** After an agent accepts the call, the call permanently exits the campaign, and you can never bring it back. Select from the following: ■ **Select Workgroup**: From the drop-down list, select the workgroup from which your campaign will request an available agent. ■ **Variable Reference**: Click and then type the name of a variable already assigned the ID of a workgroup. **TIP:** See "Using Variables in Menus" on page 215. **NOTE:** If your variable has an invalid workgroup name, the campaign routes the call to your default-system error choice. **TIP:** See "Changing Campaign Default Settings" on page 265.

Option	Description
Get DTMF	Use this option to: ■ Prompt the user to make a choice by pressing a key (such as *Press 1 to continue in English...*) ■ Trap the user's keypress. ■ Route to a special child node for handling the user's keypress. **NOTE:** A Play Prompt always precedes the Get DTMF action. This action uses special *DTMF Child* nodes (which handle the keypress) and are created using the Menu Routing Conditions dialog box. Select from the following: ■ **Number of Retries Before Disconnect/Timeout**: Type how many times to replay your prompt if the caller does not press any key or presses an invalid key. ■ **Timeout**: Type how long (in seconds) to wait for the caller to press a key before the campaign disconnects the call. **NOTE:** These two simple options use complex execution logic. See "Linking Resources Using the Campaign Wizard" on page 273, which includes a simple example of how to use the Get DTMF action and the DTMF Child nodes. See "Routing a DTMF (Customer Keypress)" on page 288 for more information about the DTMF Child nodes.
Enable Quality Control Recording	Select this option to record both sides of a call. As soon as an agent accepts the call, recording begins. The recording continues until the call is disconnected. **NOTE:** Supervisors can listen to the recording from the Supervision Manager Interaction History tab.
Disable Quality Control Recording	Select this option to ensure that CCA does not record calls in your campaign. However, you can override this action from AM by navigating to Options, Agents, Controls and Restrictions tab, and selecting the Enable Automatic Recording of Agent. **TIP:** See "Enable automatic recording of Agent" on page 187 for more information.
Play Estimated Wait Time	Select to inform the waiting customer (phone or Web chat) of the estimated wait time.

Option	Description
Exit Workgroup	**NOTE:** Always use with the Enter Workgroup action. Select this option to request an available agent from a workgroup while your campaign keeps control over the call. **TIP:** See "Enter Workgroup" on page 260. After an agent accepts the call, the call leaves your campaign indefinitely. At any time before an agent accepts the call, you can cancel your request for a workgroup agent, and return the call to normal execution by your campaign, by adding this Exit Workgroup action to a node. For example, your campaign might do the following: ■ Ask the caller to press 1 to speak to an Agent. ■ Trap the caller's keypress. ■ Route to a Child DTMF node (if the caller pressed 1). ■ Use *Enter Workgroup* to request an available agent. ■ Check estimated wait time. **NOTE:** If the caller has been waiting too long, use Exit Workgroup to route the caller to another option in your campaign.
Set Script URL	**URL**: From the drop-down list, select a script to display to the agent when the campaign routes the call to them.
Set FAQ URL	**URL**: From the drop-down list, select an FAQ to display to the agent when the campaign routes the call to them.

Option	Description
Workgroup Callback	Select this option to: ■ Get the caller's country code and phone number. ■ Send a callback request to a Workgroup. This action submits a callback request to a workgroup, and then disconnects the call. For example, in one node you can have these actions: ■ Play Prompt (prompt the caller for the country code) ■ Get User Digit (trap the country code in a variable) ■ Play Prompt (prompt the caller for the phone number) ■ Get User Digit (trap the phone number in a variable) ■ Workgroup Callback (send the caller's country code and phone number to the selected workgroup, and then disconnect the call) Select from the following: ■ **Country Code Variable**: Enter a variable name, which is already populated with a country code. ■ **Variable Phone Number**: Enter a variable name, which is already populated with a country code. ■ **Current Workgroup**: Select this option to use only if you previously used an Enter Workgroup action. The campaign uses the workgroup you selected in the Enter Workgroup action. If, for some reason, the campaign cannot find a valid current workgroup, the campaign routes the call to your default-system error of your choice. **TIP:** See "Changing Campaign Default Settings" on page 265. ■ **Select Workgroup**: Select to send the callback request to the workgroup that you select from the corresponding drop-down list. ■ **Variable**: Select and then type a variable name, which is already populated with the ID of a workgroup. **TIP:** See "About Using Variable Reference Fields" on page 282. **NOTE:** If your variable does not contain the name of a valid workgroup, the campaign routes the call to your default system error choice. **TIP:** See "Changing Campaign Default Settings" on page 265.

Option	Description
Web Service	Enter the following information to access a Web service. **URL**: The Universal Resource Locator address of the Web service. **Timeout (sec)**: The time after which CCA will stop trying to access the Web service. **Status Variable**: The current status of the Web service. **Variables**: Other variables to pass to the Web service.

NOTE: You can chain actions in a row, so one node might have multiple actions.

8 After selecting either a Set Menu Type or Set Action Menu option, the Campaign Wizard presents different options. After making your selections a new Default node appears.

9 You can right-click that node, and select either Set Menu Type or Set Action Menu again, for additional campaign actions.

You can, therefore, have many nodes in your campaign.

Associating the Campaign with a Project

After creating a campaign, you must route it to a phone project or to one or more project menus within a project. These steps describe how to associate the campaign with a Project:

To associate the campaign with a Project

1. Open a project, and select the Phone tab.
2. At the bottom of the Phone tab, click Campaign.
3. Select the name of your campaign from the drop-down list. When a customer calls the project phone number, CCA instantly routes the customer to the *Begin* node of your campaign.

Associating the Campaign with a Project Menu

After creating a campaign, you must route it to a phone project or to one or more project menus within a project. These steps describe how to associate the campaign with a Project Menu:

To associate the campaign with a Project Menu

1. Open a project menu and select the Touch-Tones tab.
2. On the left side of the screen, select a key.
3. On the right side of the screen, click Campaign, and then select a campaign from the drop-down list.

Deploying the Campaign

After creating a campaign, associating it with a project or project menu, you must deploy it within the AM Campaigns option:

To deploy the campaign

1. In the AM Navigation Pane, click Options and then select (to highlight) the campaign you want to deploy.
2. Click Deploy, and click OK in the confirmation message.

   CCA makes a complete, separate, draft copy of the campaign, and displays it along with the Deploy icon in the Campaign List page.

CAUTION: You must delete the existing Deployed version first.

Creating a Draft Campaign from a Deployed Campaign

If you made changes to a deployed campaign and want to overwrite an existing draft version:

To create a draft campaign from a deployed campaign

1. Delete the existing draft version.
2. Select the deployed campaign, and click Create a Draft Campaign.

Redeploying the Campaign

If you made changes to a Draft campaign and want to overwrite an existing deployed version:

To redeploy the campaign

1. Delete the existing deployed version.
2. Select the Draft campaign, and click Deploy.
3. You must first delete the existing draft version.

Changing Campaign Default Settings

When creating a new campaign, the New Campaign Wizard asks you to create some default settings.

To change the campaign default settings

1 Modify these default settings by clicking the Campaign Settings link in the top-right corner of the Campaign Window.

The Campaign Settings box opens to the General tab, where you can change the name and description of the campaign.

2 Use the information in the following table to complete the fields in the General tab:

Item	Description
Name	The name of your campaign.
Description	The campaign description appears only in the main screen, showing the list of all campaigns.

3 Click and Advanced tab to change the default error instructions.

These are the default actions the campaign follows if the customer does something unexpected and, for some reason, a Default node (condition) does not exist.

4 Use the information in the following table to make your selections in the Advanced tab fields:

Fields	Description
In Case of Any System Error, Go To:	Set up the routing condition for CCA to execute when a system error occurs. For example, a system error occurs when the campaign cannot take any other routing action. If one node is configured to route to another node, and the second node was deleted, a system error occurs and CCA executes the routing action you select. You can route system errors to one of the following areas: ■ Workgroup ■ Workgroup Voicemail ■ User ■ User Voicemail ■ Disconnect
Allow Type Ahead	If you have a node (anywhere in the campaign) that plays a prompt and then traps the user's key press with a Get User Digit or Get DTMF action, the user can enter a response without listening to the entire prompt. **TIP:** See "Get User Digit" on page 256. **TIP:** See "Get DTMF" on page 261.
Enter Digit Timeout	This option applies to any place in your campaign where you ask the customer to enter multiple key presses. The Enter Digit Timeout is the wait time between key presses. When the timeout is reached, the campaign moves on to the next action (which could be validating the customer's entry, making a routing decision, and so on).

12 Creating a Campaign by Routing Calls Through Business Events

This chapter shows how to create a campaign that routes calls through business events to a simple menu, using the Campaign Wizard. This chapter includes the following topics:

- Designing the Campaign
- Creating a Sample Call Flow Diagram
- Creating Support Resources
- Linking Resources Using the Campaign Wizard

Designing the Campaign

The best way to design a campaign is to:

1. Creating a Sample Call Flow Diagram. Continue to add additional flow diagrams (or create a series of call flow charts) to illustrate a complex call flow as moves through the system.
2. Creating Support Resources. After finishing your call flow diagram, create all of the pieces to support it (including resources, menus, prompts, SQL queries, and so on).
3. Linking Resources Using the Campaign Wizard.Using the Campaign Wizard, link all of those pieces together to create the campaign.
4. Finally, associate (route) your campaign from either a phone project or project menu, and then deploy it.

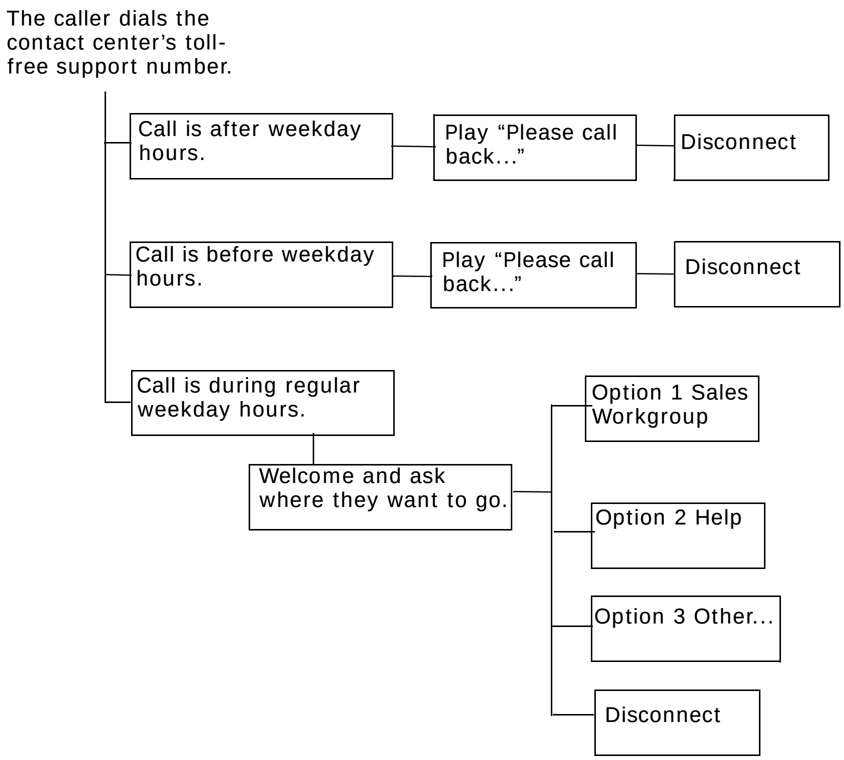
Creating a Sample Call Flow Diagram

The purpose of this example campaign is to route incoming calls.

To create a sample call flow diagram

1. Identify default condition for the campaign, if the action for this step fails.
2. If the call occurs during nonbusiness hours, ask the customer to call back during regular business hours.
3. If the call occurs during regular business hours, welcome the customer, and provide the option to select a workgroup.
4. Capture the customer’s entries.

5 Route to the specified workgroup. The following figure shows an example call flow.



Creating Support Resources

Create support resources, and store them in AM's various Libraries. For this example, do the following:

To create support resources

1 Build three business events:
   - One regular business hours
   - Two for after hours (8 P.M. to 12 A.M and 12 A.M. to 8 A.M.)

2 Create a prompt providing the business hours, and store the prompt in the Prompt Library.

3 Create a welcome prompt asking where the caller wants to be directed.

4 Create a workgroup.

Creating a Business Event

To create a business event

1. From the AM Navigation area, select Libraries, Business Events, and then click Add. The Add Business Event screen opens.
2. Type a name for the event (such as *Regular Business Hours*), and then click Plus. The Define Sub Event dialog box opens.
3. In the Define Sub-event dialog box:
   a. Type a name in the Sub Event Name box (such as *Regular Weekday Hours*).
   b. Under Schedule Event, click Weekly to add weekly events.
4. Click Monday through Friday and then:
   a. From: select 8 hrs. and 0 mins.
   b. To: select 10 hrs. and 0 mins.
5. Click OK. The Regular Weekly Hours business event appears in the Sub Event list.
6. Click OK. The Regular Weekly Hours event appears in the Business Event main list.
7. Click Add and repeat these steps to create a second business event for before the business opens (12 A.M. to 8 A.M.).
8. Repeat to create a third business event for after business hours (8 P.M. to 11:59 P.M.), and click OK.

   The Business Events list displays three events.

   Regular Business Hours appears in the Business Events list.

   NOTE: In a real situation, you would probably want to create additional business events (for holidays and weekends, for example).

Creating Prompts

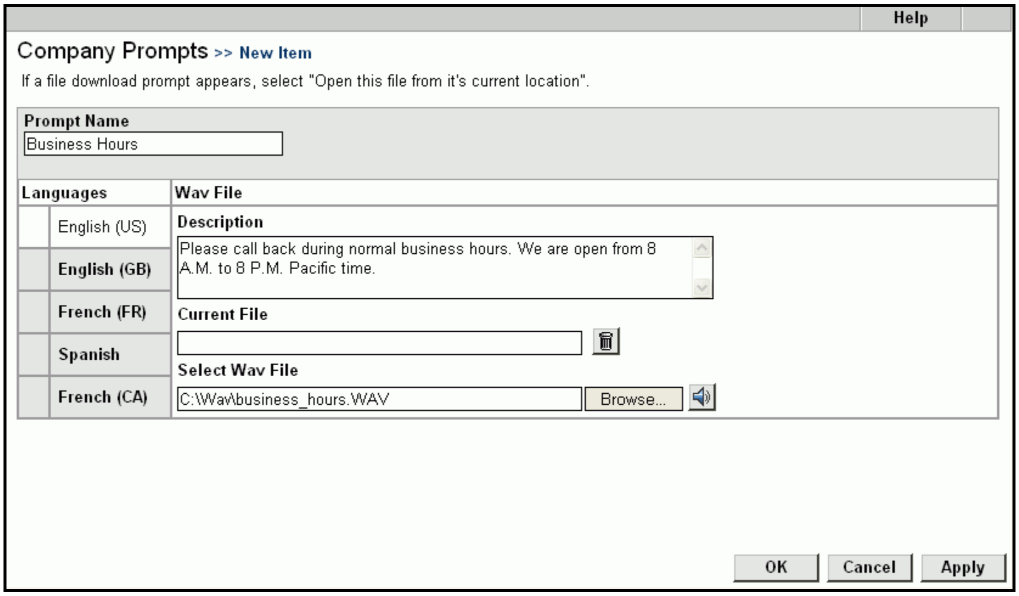
Next, using a recording program, create voice files for the various prompts that you want your caller to hear. The files must be in stored in .wav format on your computer or network. The prompts to create for this example include the following:

- **A Welcome prompt.** *Such as, Thank you for calling XYZ Company. Press 1 to connect to the first available sales representative.*
- **Nonbusiness hours instructions.** Such as, *Please call back during normal business hours. We are open from 8 A.M. to 8 P.M. Pacific time.*

After creating prompts, you must load them into the Prompt Library.

To create prompts

1. In the navigation pane of AM, click Libraries, Company Prompts, and then Add. The Company Prompts screen opens.
2. Type a name for the prompt in the Prompt Name text box (such as *Business Hours*). The name you enter appears in the prompt list when you set AM to the language supported by this prompt.
3. Click the language in which you already recorded your prompt, for example, click English (US).
4. In the Description text box, type a description of the prompt. This description appears in the prompt list when you set AM to the language supported by this prompt.
5. Type the filename and path to the prompt (or click Browse to choose the file from your computer or network). The following figure shows an example of a completed screen.



6. (Optional) Click the sound icon to listen to the recording to verify that it is correct.
7. Click OK. The Business Hours prompt appears in the Company Prompt List.
8. Repeat these steps, beginning with Step 2 on page 272, for all of the prompts you need for this campaign.

NOTE: CCA stores the new prompts in the CCA database.

Creating Workgroups

To create workgroups

Create a sales workgroup to which you route the call during regular business hours. Create the workgroup using AM, for more information, see “Creating a Workgroup” on page 202.

Linking Resources Using the Campaign Wizard

Assuming you already created the library resources, follow the steps in this topic to create a campaign to route the calls through business events to a simple campaign. Later, after you create your own company-specific resources, you will know how to insert them into your campaign using the Campaign Wizard and this example.

To link resources using the Campaign Wizard

1. In the AM Navigation Pane, click Options, Campaign, and then click Add. The Java Web Start process begins and, after a few minutes, the Campaign Editor opens the New Campaign Wizard box.
2. Type a name and description for your new campaign.
3. Click Next. The next box opens where you can identify default actions to take if the customer does something unexpected and, for some reason, a Default node (condition) does not exist.

   NOTE: CCA automatically creates a Default node when you create a campaign.

4. For this example:
   a. From the Go to drop-down list, select the workgroup you created.
   b. From the Select Workgroup drop-down list, select English.
5. Click Finish. The Campaign Workspace opens, showing a *Begin* node.
6. For this example, set an action:
   a. Right-click the Begin node box (which is surrounded by a red outline). A menu appears.
   b. From the menu, select Set Action Menu. You can set many actions for a node, however, to enable both Business Events and Touch-Tone Routing, you must select Get DTMF.

   TIP: See "Adding Actions to Nodes" on page 284 for more information.

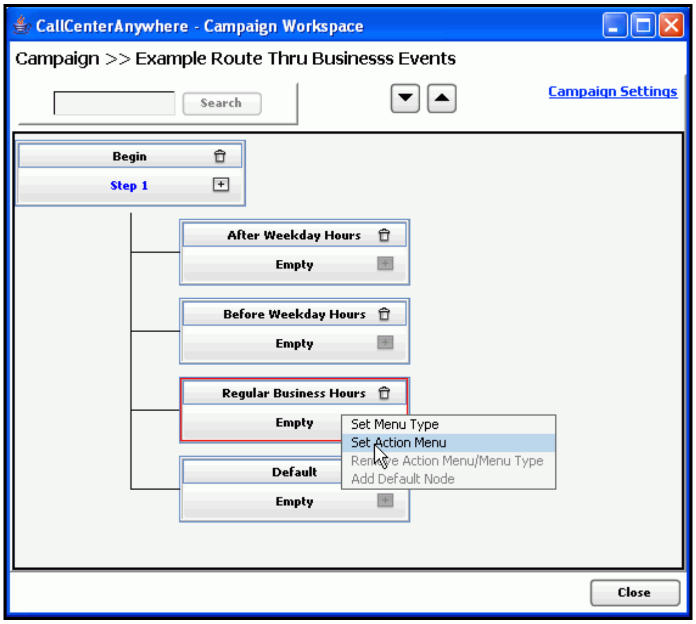
7. Select and drag Get DTMF to the Begin display area (identified by a slightly gray background).
8. Double-click the Get DTMF heading (folder icon) to expand it:
   a. In the Action Menu Name box, type a name for this step (such as *Step 1*).
   b. In the Number of retries before disconnect/time-out box, type 0.
   c. In the Timeout box, type 5. (Five seconds.)
   d. Click OK.

   The Campaign Workspace refreshes to show the name of your first node (under the Begin node and a new Default node.

9. You must identify the business events routing. Click Plus (next to Step 1). The Menu Routing Conditions dialog box opens.
10. Select Scheduled Event and then check each event, and click OK.

   The Campaign Workspace refreshes to show a node for each business event, plus the default node.

11 Set an action for each node by right-clicking it, and selecting Set Action Menu. The following figure shows an example for the Regular Hours node.



12 To set a prompt and DTMF for a touch-tone menu, click and drag Play Prompt to the Begin gray area.

13 Double-click the Play Prompt heading (folder icon) to expand it:

a In the Action Menu Name box, type a name for this action. For this example, type *Route to Greeting*.

b Select Prompt Name and, from the drop-down list, select the .wav file you created and stored in the Company Prompts Library.

c Click Allow Caller to Interrupt, which is means the caller can make a selection before the prompt finishes.

14 Click and drag Get DTMF into the work area. The Get DTMF action appears below the Play Prompt action.

15 Double-click the Get DTMF heading (folder icon) to expand it:

a In the Number of retries before disconnect/time-out box, type 1.

b In the Timeout box, type 5. (Five seconds between retries.)

c Click OK. The Campaign Workspace refreshes to show the Route to Greeting name under the Regular Business hours and a new default node.

16 To configure the number of buttons for touch-tone routing, click Plus in the Regular Business Hours node. The Menu Routing Conditions box opens.

17 Select DTMF and highlight the number of buttons that you want for touch-tone routing, and click OK. (In this case select numbers 1, 2, and 3.)

The Campaign Window refreshes to show two new nodes (one for each selection) and a new default node.

18 Right-click Node 1, and select Set Menu Type from the menu. The Menu Type box opens.

19 In the Menu Type Name box, type a name that shows the action you are taking, for example, Option 1 - Route to Sales_Workgroup.

20 Select Workgroup Extension and then, from the Workgroup Name drop-down list, select the Sales_Workgroup you already created, and click OK.

The Campaign Workspace refreshes to show the Route to Sales node name for option 1.

21 Follow the same steps for Option 2 to route to another workgroup or to an advanced feature.

TIP: See Chapter 13, “Creating Advanced Features in a Campaign.”

22 For both the Before and After Weekday Hours nodes, create a call flow to the prompt created earlier (which asked the caller to call back during regular business hours). Then, disconnect the call.

23 Before you finish your campaign, configure the defaults for each suboption or delete them so that the campaign uses the main default option that you set up in Step 3 on page 273.

24 Click Close and Yes (to the confirmation message).

25 Associate (route) the campaign to a phone project or a project menu.

TIP: See “Associating the Campaign with a Project” on page 264.

26 Deploy the campaign.

TIP: See “Deploying the Campaign” on page 265.

13 Creating Advanced Features in a Campaign

This chapter shows how to create advanced features in a campaign. This chapter includes the following topics:

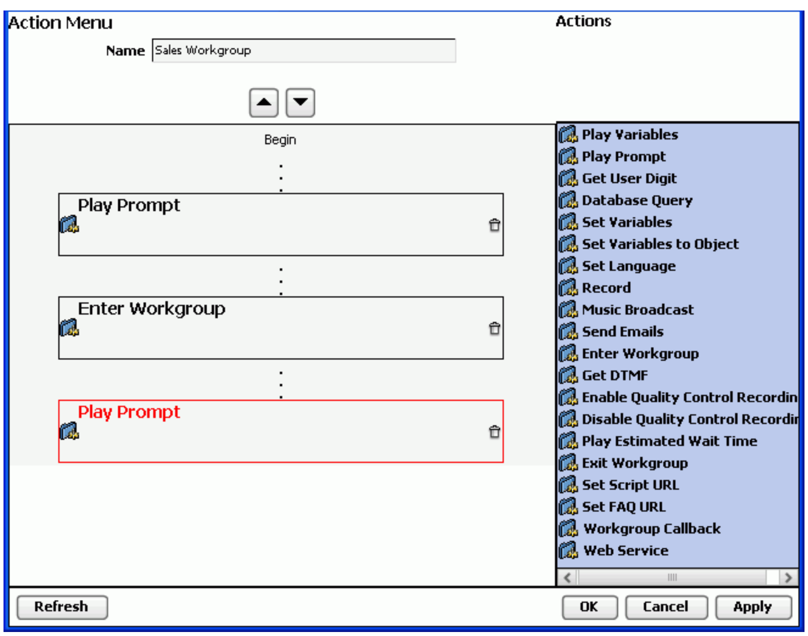
- About Custom Workgroup Messages
- Process of Setting Up a Workgroup Callback
- Process of Sending an Email Automatically from a Part of the Campaign

About Custom Workgroup Messages

Sometimes, you might want to create a custom message for callers. For example, rather than have the caller wait for an available agent, present another option: the caller hears the first Welcome prompt:

- If an agent is available in the workgroup, the campaign routes the caller to the agent.
- If an agent is not available in the workgroup, the campaign routes the caller to another choice.

The following figure shows an example of the Action Menu for this type of call flow.



Process of Setting Up a Workgroup Callback

Using the Actions Menu, you can set up a workgroup callback outside the normal workgroup functionality:

1. Play a prompt asking for the caller’s country code.
2. Using the Get Digits function, set it for two digits, with a pound (#) terminator. Save this as variable #X.
3. Play a prompt asking for the caller’s area code and telephone number.
4. Using the Get Digits function, set it for 11 digits (the phone number and the terminator). Save this variable as $Y.
5. Select the Workgroup Callback function and put the $X for the country code variable and the $Y for the phone number variable. Select the workgroup from the drop-down list.

NOTE: When the caller finishes entering the final number, the call is terminated.

Process of Sending an Email Automatically from a Part of the Campaign

One way to determine whether your campaign has any issues (such as no agents logged in to a workgroup, or there are a greater number of people selecting a specific option) is to have the campaign send you an email from a specific part of the campaign.

CAUTION: Before using this action, you must create at least one SMTP Group.

TIP: See “Creating an SMTP Groups Library” on page 148.

1. In the Action Menu, select Send Email.
2. Give the email a label, your email address (as the receiver), a subject, and text identifying the section of the campaign that you are testing.

   Then, when a caller reaches that section of the campaign, the email is automatically sent.

14 Managing Campaign Features

This chapter explains how to manage campaign nodes, use variable reference fields, run SQL queries, use menu routing conditions, and understand business event routing logic. This chapter includes the following topics:

About Managing Campaign Nodes

When creating a campaign, CCA uses nodes (or segments) for containing instructions, such as prompts, options, routing, and other conditions). Each node is represented by a rectangular box in the Campaign Wizard. Figure 17 shows an example of a campaign containing six nodes.

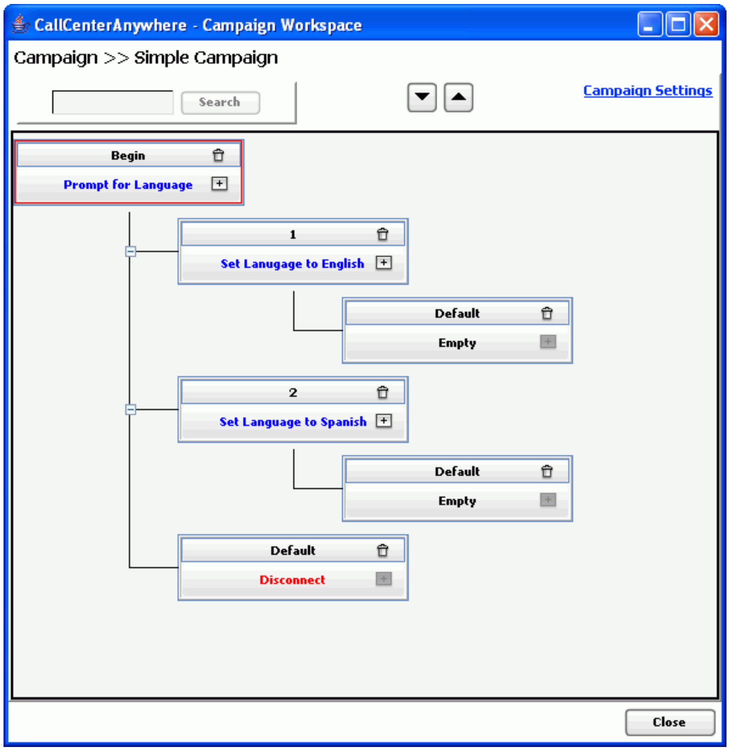


Figure 17. Example Campaign With 6 Nodes

About Adding Nodes and Child Nodes

When you first create a campaign, CCA automatically creates the first node, called the *Begin* node. Campaigns can also have Parent nodes and the associated Child nodes. There are three ways to add Child nodes:

- Select Set Action Type, to perform a specific action (such as play a prompt, capture the customer's keypresses, run a query, and so on):

  a. Right-click a node.

  b. From the menu, select Set Action Menu.

  Setting an action on a node automatically creates a Child Default node.

  TIP: See "Adding Actions to Nodes" on page 284.

- Add or replace a Default Node.

  If a Parent node already has an action, but the default node was deleted, you can replace the default node by right-clicking the Parent node, and choosing Add Default Node.

- Add Menu Routing Conditions:

  c Right-click a node.

  d From the menu, select Set Menu Type.

  CCA creates one Child node for each condition, plus a Default node.

  TIP: See "Adding a Menu Routing Condition" on page 285.

Deleting Nodes and Child Nodes

Note the following about deleting nodes:

- You can delete any node, except the Begin node.
- When you delete a node, CCA deletes all of its Child nodes as well.

To delete nodes and child nodes

1. In the Node to that you want delete, click Delete (the trash can icon).
2. Click Yes to the confirmation message.

   CCA deletes the Parent node and all of its associated Child nodes.

About Moving Nodes

Generally, CCA executes the nodes in a campaign from top to bottom. You can move a node by selecting the node, and then clicking the up or down arrow at the top of the Campaign window. However, there are several restrictions:

- You cannot move the *Begin* node.
- You cannot move *DTMF Child* nodes.
- You cannot move a *Default* node.
- If you move a *Parent* node, all of its *Child* nodes also move.

Searching for a Node

If your campaign is large, you can locate a node by searching on its name.

NOTE: The node name appears in blue text for Action nodes, and red text for Menu Type nodes.

To search for a node

1. Open the campaign and type the node name in the Search text box (located in the upper-left corner of the Campaign window).

   NOTE: Searches are not case sensitive. You can use the asterisk (*) wildcard. For example, type *Spanish to find the *Set Language to Spanish* node.

2. Click Search.

   When located, the Campaign Window scrolls to its location and highlights the node's borders in red.

About Using Variables in Campaigns

The rules and requirements for variables in campaigns are the same as they are for variables in project menus.

TIP: See "Using Variables in Menus" on page 215.

About Using Variable Reference Fields

CAUTION: Before entering a variable in a Variable Reference field, you must first use the *Set Variables to Object* action to initialize the variable.

The Set Variables to Object action lets you find the internal ID of a workgroup, user, or prompt, and assign it to a variable. When you have the ID in a variable, you can enter the variable name in any Variable Reference field.

Using "Set Variables to Object Action" with a Menu Type

In this example, set up a variable that you can use to route from a campaign node to a workgroup.

To use a "Set Variable to Object Action" with a Menu Type

1. Right-click a node, select Set Action Menu, type a name for the node (such as, Get Sales Workgroup ID), and add a Set Variables to Object action.
   a. In the variable box, type `$Sales`.
   b. In the Value box, from the drop-down list, select Sales_Workgroup, and click OK.

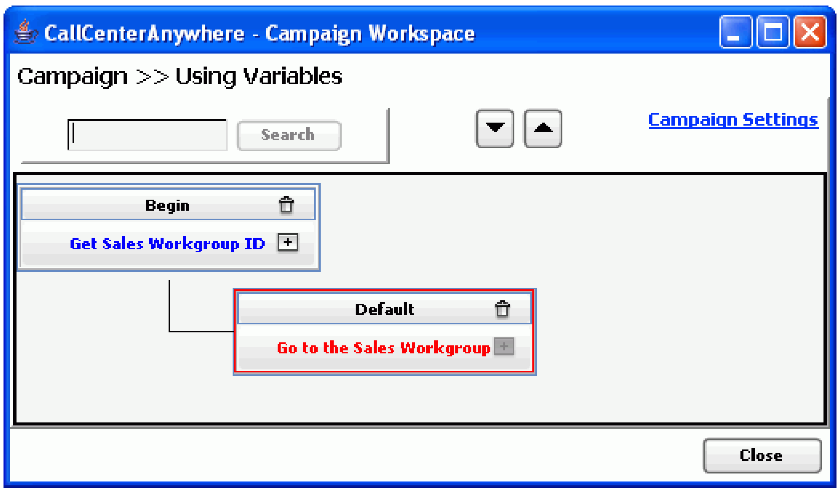
   NOTE: You added a Set Variables to Object action in the *Begin* node, but you could have done it in any node. Because you added an action to a node, the system also created a default child node.

2. Right-click the default child node, choose Set Menu Type, and type a name for the node (such as Go to the Sales Workgroup):
   a. Click Workgroup Extension.

b From the Workgroup Name drop-down list, select Sales_Workgroup.

c Click Variable Reference, and then type $Sales into the box, lick OK.

The Campaign window looks like the following figure:



Using “Set Variables to Object” with Another Action

A number of actions also have a Variable Reference field. As in the previous example, first you use the Set Variables to Object action to initialize your variable, then you can use that variable in any other action.

In this example:

- Use the Variables to Object action to find the internal ID of a workgroup, and then assign it to a variable ($Sales).
- Next, enter the $Sales variable in the Variable Reference field of the Enter Workgroup action.

To use a “Set Variables to Object” with another action

1. Right-click a node, and select Set Action Menu.
2. Add two actions: A Set Variables to Object action and An Enter Workgroup action.
3. In the Enter Workgroup node, select Variable Reference, and then type the variable ($Sales) into the box.

   When you initialize a variable ($Sales) using Set Variables to Object, you can use that variable in any Variable Reference field.

NOTE: You do not need to put both actions in the same node, as in the example. You must make sure that your Set Variables to Object action is executed before entering its variable in a Variable Reference field. You must initialize your variables before you use them.

When entering a variable in a *Variable Reference* field, the system expects the variable to have an internal ID number (not the name of a prompt or a workgroup). For example, in the CCA database, all prompts have a unique identifier. If you create a prompt called, *Play_Welcome.wav*, the ID of that prompt in the database might be 71. When you put a variable in the Variable Reference field of the Play Prompt action, the system expects your variable to have the ID of the prompt (*71*), not the prompt name (*Play_Welcome.wav*).

About Running SQL Queries

Before running an SQL query, you must:

- (Windows only) Create an ODBC System DSN entry for the database to access. The DSN entry must be created on the machine where the CCA Statistics Server is installed.
- Create a Database Connection that points to your System DSN.

About Menu Type Routing

Use the Menu Type window to route the caller to a feature inside or outside a campaign. For example:

- Route a call to any node in the current campaign.
- Route a call to an external number or to a project.

NOTE: A node with a Menu Type is a termination point and does not need any child nodes. CCA sends the call to another node or to some other feature.

TIP: See "About Project Menu Types" on page 213.

Selecting a Menu Type to Add to a Node

Route the caller to a feature inside or outside a campaign.

To select a Menu Type to add a node

1. Right-click a node and select Set Menu Type. The Menu Type window opens.
2. Use the information in the Menu Type table to understand the Menu Type options.

Removing a Menu Type from a Node

- Right-click a node and select Remove Action Menu/Menu Type.

Adding Actions to Nodes

Add an action to a node when you want to:

- Give the caller some information.
- Get information from the caller.
- Take action on behalf of the caller.

To add actions to nodes

1. Right-click a node and select Set Action Menu. The Action Menu window appears.
   a. You can set more than one action in the same node. For example, in the same node you can:
      - Play a prompt that asks the customer to enter the account number.
      - Trap the user's account number.
      - Run an SQL query to verify that the account exists, and find the user's balance.
      - Play the user's balance to them.
   b. Use the arrow buttons to rearrange the actions.
2. Use the information in the Action Menu table to understand the action to specify.

About Using Menu Routing Conditions

Menu Routing Conditions allow your campaign to route calls based on meeting a specific condition. Your campaign can route calls based on three types of conditions:

- **Scheduled Event.** Your campaign can route calls based on the time when the call reaches your company. For example, you can route the call one way if it reaches your company during business hours, and another way if it comes in when your company is closed.
- **DTMF.** Your campaign can make a routing decision based on a customer key press.
- **Regular Expression.** You can make routing decisions by testing or comparing the value of variables. For example: `if (`*`some variable condition`*`) then (`*`route to...`*`)`

Adding a Menu Routing Condition

NOTE: You must set at least one action on a node before you can add a menu routing condition on that node.

To add a menu routing condition

1. Right-click a node, select Set Action Menu, add an action to the node, and click OK.

   TIP: See "Adding Actions to Nodes" on page 284.

NOTE: You cannot add a menu routing condition on a node that has a Menu Type. A Menu Type is like a termination point that does its own routing. If you are using a Menu Type in a node, a Menu Routing Condition is never required.

2 In the Campaign window, locate the node to add Menu Routing, and then click Plus.

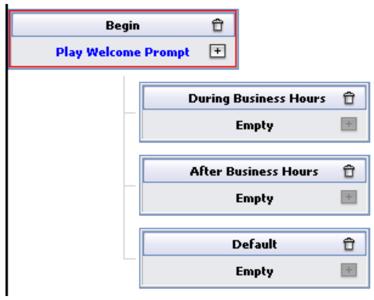
The Menu Routing Conditions dialog box opens.

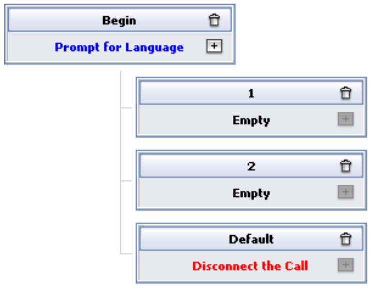
3 Select a Menu Routing Condition type (such as Scheduled Event, DTMF, or Regular Expressions) and then select one or more specific options.

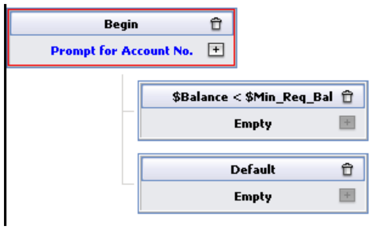
About Menu Routing Conditions and Child Nodes

All Menu Routing Conditions create at least two Child nodes:.

- One Child node for each condition.
- A Default Child node (executed if none of your other conditions are met). The following figures show examples of different events and child nodes.







About Business Event Routing Logic

When you route to a business event child node, the first child node where the condition is TRUE will be executed.

Routing a Scheduled Event (Business Event)

This example provides an overview of the steps required to route a scheduled event.

To route a scheduled event

1 Create one or more business events.

TIP: See "Process of Creating a Business Events Library" on page 90.

2 Select a node where you have already set an action.

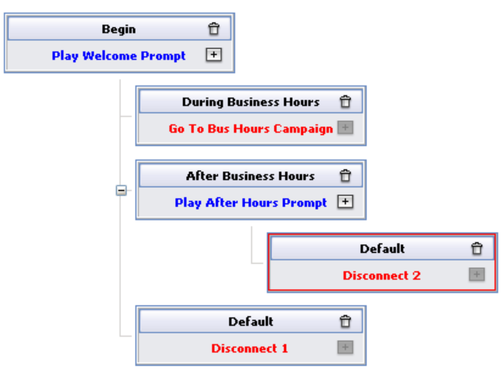
3 Click the Plus icon of the node.

4 In the Menu Routing Conditions dialog box:

a Select Scheduled Event, then select one or more of the Events that you created.

b Click OK. The main Campaign window appears.

5 In the main Campaign window, you have one child node for each business event that you selected, plus a default node to handle unexpected conditions.



Usually, you select each node and set one of the following:

- A Menu Type to route the call to some feature, such as another Campaign, or
- An action (or several actions) and possibly some more Menu Routing Conditions.

TIP: See "Selecting a Menu Type" on page 252.

Routing a DTMF (Customer Keypress)

In this example, if the customer calls during business hours, the During Business Hours node will be executed. However, what if someone made a mistake in the hours when creating the business events, so that if a customer calls between 4:00 pm and 5:00 pm, it is considered both during business hours and after business hours? In this case the During Business Hours node will still be executed, because it is the first child node whose condition was met.

1 Use the Action Menu to add a Get DTMF action to a node.

TIP: See "Adding Actions to Nodes" on page 284.

Usually the node will use a Play Prompt action to ask the caller to make a selection by pressing a key, and then use the Get DTMF action to trap the caller's keypress.

2 Click Plus (Figure 18) on the node.

Figure 18. Plus Button

3 In the Menu Routing Conditions dialog box:

a Select DTMF, and then click one or more of the keypress buttons (1, 2, 3, and so on), and click OK.

The main Campaign window appears.

Notice that you have one child node for each DTMF keypress that you selected, plus a default node to handle unexpected conditions.

4 Normally, you select each node and set one of the following:

- A Menu Type to route the call to some feature (such as another Campaign)
- An Action (or several actions) and possibly some more Menu Routing Conditions

TIP: See "Selecting a Menu Type" on page 252.

About DTMF Routing Logic

Figure 19 shows how a node that contains a Get DTMF action is executed and how a DTMF child node is selected.

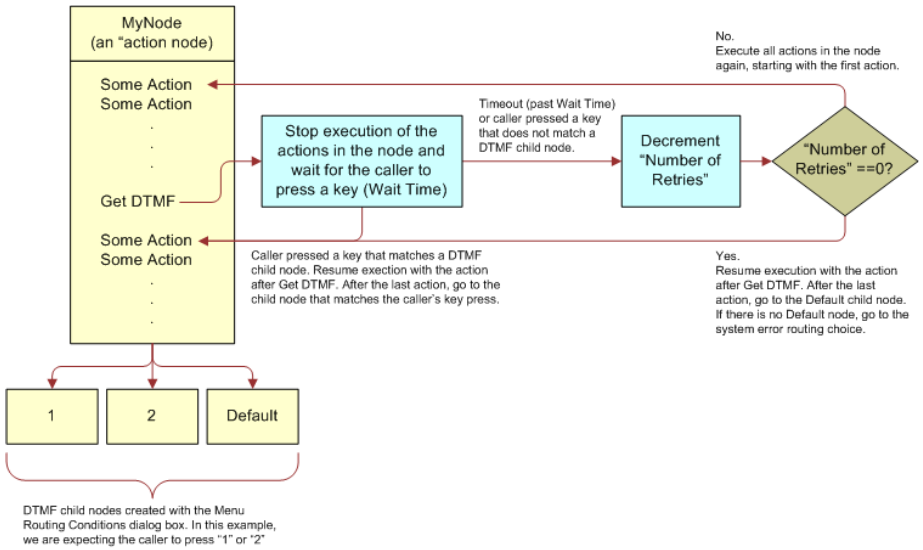


Figure 19. Execution Logic of the Get DTMF Action

TIP: See "Linking Resources Using the Campaign Wizard" on page 273, which includes a simple example of how to use the Get DTMF action and the DTMF Child nodes.

About Regular Expression Routing Logic

Routing goes to the first child node whose regular expression evaluated to 1.

- If none of the regular expression child nodes evaluate to 1, the default node is executed.
- If the default node has been deleted, your system error routing choice will be used. See "Changing Campaign Default Settings" on page 265.

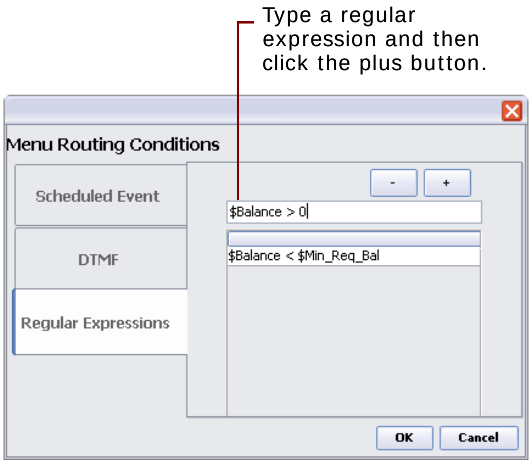
Routing a Regular Expression

Your regular expressions can use system variables, variables that you created or assigned in some other location in the campaign, and new variables.

To route a regular expression

1. Select a node where you have already set an action and click Plus. (In this example, you used the Action Menu to add a Play Prompt action on the node.)

2 In the Menu Routing Conditions dialog box:



a Select Regular Expressions.

b Type a regular expression in the text box, and then click Plus to add it to the list.

You can enter as many regular expressions as you want.

NOTE: Every regular expression that you add creates one child node.

NOTE: Using a variable for the first time creates the variable.

Also, your regular expression can use any of the CCA operators.

TIP: See “Operators” on page 219.

3 Click OK.

In the main Campaign window, one child node appears for each regular expression you entered, plus a default node to handle unexpected conditions.

4 Normally, you select each node, and set either of the following:

- A Menu Type to route the call to some feature, such as another campaign
- An Action (or several actions), and possibly some more Menu Routing Conditions

TIP: See “Selecting a Menu Type” on page 252.

15 Creating Projects

This chapter describes how to create projects to save groups of settings and attributes for controlling how the contact center receives and routes interactions (phone, email, Web chat). It also shows how to create a project and set it up to handle specific types of interactions. This chapter includes the following topics:

Creating a Project Definition

Create a project definition, by assigning a project name, providing a description, and choosing the default language that the project supports.

NOTE: The same project can handle one or more interaction types.

After creating a project, use Project Scheduling to activate and deactivate projects based on the company's needs or operating hours.

TIP: See "Setting Up Project Schedules" on page 343.

To create a project definition

Also see the topic about project routing and reporting in the *Contact Center Anywhere Reports Guide.*

1 Click Options, Projects, and then Add. The Add Projects screen opens to the General tab.

2 Use the information in the following table to complete the Project Name fields:

Field	Description
Name	Type a name describing the purpose of the project. For example, *Investor Inquiries* might route potential investors to agents ready to answer the questions. *After-Hours* might send callers directly to a greeting informing them that the office is closed.
Description	Type a description of the details of the customers who reach this project, and the strategy for routing customers. **NOTE:** This text is informational only and does not affect the functioning of the project.
Select a Default Language for this Project	From the drop-down list, select the language for this project. CCA plays prompts recorded in this language for callers reaching this project. To change the language in which CCA plays prompts, route callers to the touch-tone menus or other projects that have an alternate language. For more information on how to route a caller to a menu and switch the language of the project, see "Menu" on page 224. For more information on how to route a caller to another project, see "Change Project" on page 226.
Phone Number (Caller ID)	From the customer's perspective, this is the phone number CCA calls. For example, if the customer has caller ID, the caller ID appears.
Always Use Caller ID	Select this option to always use the caller's ID as the phone number.
Select Display Template for this Project	From the drop-down list, select a Display Template for this project. Every project uses a template to support features like predictive dialing and auto-assignment. Select the default System Display Template or create a different template. **TIP:** For more information on how to create a template, see page 96. **NOTE:** Click the Display Templates icon to view the default templates.
Use this Project for Billing	When checked, the agent can select this project for billing when making an outbound call. When not checked, agents cannot select this project for billing when making an outbound call, and the project does not appear in IM, Configuration dialog box, General tab, Project Billing list box.
Enable Project Interaction Limit Interaction Limit box	Select this check box to enable a limit to the number of calls accepted for each project. Then, in the Interaction Limit box, type the maximum number of calls for each project. When the number of calls for the project reaches this limit, CCA plays a busy signal to the caller.

Field	Description
Enable Dial Code	When checked, CCA automatically dials additional digits following the phone number when dialing a long-distance number. (These additional digits are the dial code.) **NOTE:** Enable this feature only if the telephone provider (or additional hardware) requires a dial code.
Long Distance Password	Enter a password if the phone system requires a password before connecting a long distance outbound, and if you do not want agents or supervisors to enter the password themselves. When the agent or supervisor makes a long distance outbound call, CCA dials the number, enters the password, and then connects the call. **NOTE:** This field accepts only digits (0-9) and a comma (,). (Use the comma to add a pause before or after the password.)
Number of Digits to Activate Dial Code	Enter the number of digits that CCA needs to require a dial code. For example, enter 10 so that CCA can determine to require a dial code for all numbers containing 10 digits or more.
Present Menu	If checked, CCA routes the call to a project menu after the agent disconnects or hangs up. The agent must remind the caller to stay on the line after the agent disconnects, because, if the caller hangs up, routing is much more difficult. Use this option to route a call to a project menu where the caller can take part in a survey or simply offer the caller more routing options after speaking with an agent.
Play Audio on Hold Using Prompt Music Broadcast	Put customers on hold in different ways: ■ CCA places a customer on hold while waiting in a workgroup queue. For more information on how to set this type of hold, see "Select Prompts for this workgroup" on page 209. The agent places a customer on hold after connecting to the customer. ■ The customer reached an agent, the agent puts the customer on hold, and then the customer hears one of the following: ■ **Prompt**. From the drop-down list, select the System Default prompt or a custom Company Prompt. ■ **Music Broadcast**. Select this option so that the customer hears a streaming music feed while on hold.

3 Click Apply.

Process of Adding Phone Interactions to a Project

Phone projects handle incoming telephone-based interactions (phone calls and faxes). When using phone projects, do the following:

- Setting Up a Project to Handle Phone Interactions (Calls and Faxes) on page 294. (Set the telephone number that customers use to reach the project.)
- Routing Phone Interactions Based on the Caller's Number on page 299. (Define where to route the caller who reaches the project.)
- Setting Up Shared-Number Phone Projects for Scheduling on page 300. (Verify the caller's number.)
- Adding Predictive Calling to a Project on page 300. (To specify which scripts and FAQ content to display for the agents working on the project.)

Setting Up a Project to Handle Phone Interactions (Calls and Faxes)

Set the telephone number that customers use to reach the project.

To set up a project to handle phone interactions

1. Click Options and then Projects. A list of projects appears.
2. Click the project to set up, and then click Edit. The Edit Project screen appears.
3. Click the Phone tab.
4. Select the Enable Phone Project option.

5 Use the information in the following table to complete the fields in the top half of the screen:

Field	Description
Project Phone Number	From the drop-down list, choose (or type) a telephone number for customers to dial to reach this project. If you have permission, clicking the Project Phone Number drop-down box shows all phone numbers defined for use in CCA projects by the network administrator. Numbers already in use by other projects do not appear in the list and cannot be selected for use by this project. **TIP:** For more information on how to define Project Phone Numbers for a Company, see "Creating a DNIS Library" on page 123.
Priority	From the drop-down list, select the priority level to assign to interactions reaching this phone project. (CCA assigns this priority to the interaction only if Customer Priority is not enabled. **TIP:** For more information on how to enable Customer Priority, see **Use Prompt to ask for customer ID**). CCA routes high-priority project interactions to an agent before routing low-priority project interactions for the same workgroup
Validate phone number No Yes Only if received	Click No. CCA does not prompt the caller for a phone number. Use the validated telephone number to identify the customer for prioritization. **TIP:** For more information on how to use telephone number information to prioritize customers, see "Identifying Customers for Prioritization" on page 351. Click Yes or Only if not received, so that CCA plays the file (defined for the "entertelno" on page 168), which asks the caller to enter a telephone number. If the customer does not enter any digits or enters fewer than the expected number (as defined in the ANI Validation Size option of the Contact Center resource in the CCA Network Manager), then CCA interprets the phone number as: not received. CCA drops the call if it is unable to validate the phone number after three attempts by the customer to supply the number. **TIP:** See the *Contact Center Anywhere Network Guide*. **NOTE:** For this feature to work correctly, also select **Enable Customer Priority Rating**.
Play Confirmation	If Validate Phone Number is checked, then select Play Confirmation so that CCA plays the customer's phone number for the customer.

Field	Description
Use Prompt to ask for customer ID	Select this option to enable customer prioritization. CCA plays the specified prompt from the Company Prompt Library and requires the customer to enter an ID number. (Use the digits supplied by the caller to identify the customer for prioritization. **TIP:** For more information on how to use Customer ID information to prioritize customers, see “Identifying Customers for Prioritization” on page 351. **NOTE:** Also enable Customer Priority Routing (from the Phone Project Options) for this prompt to work.
Script	From the drop-down list, select the script to display to the agents receiving the phone interactions that come into this project. **NOTE:** If you route the caller to a Menu, CCA displays the script specified in the Menu definition. **TIP:** See “Route to Project Menu” on page 206 **NOTE:** If you specify None for the script in the menu definition, CCA does not display a script to the agent (even if a script for the project is specified).
FAQ	From the drop-down list, choose a list to display to agents receiving phone interactions coming into this project. **NOTE:** If you route the caller to a menu, CCA displays the FAQ specified in the Menu definition. **TIP:** See “Route to Project Menu” on page 206. **NOTE:** If you specify None for the FAQ in the menu definition, CCA does not display an FAQ to the Agent, even if you have specified an FAQ for the Project.

6 Click the Route caller to subtab, if it is not already selected.

a   Use the information in the following table to complete the fields:

Field	Description
Workgroup	Click Workgroup, select a workgroup from the drop-down list (so that CCA routes callers to that workgroup), and then click one of the following: ■ **Route to Workgroup Agent**. CCA routes the call to the best available agent working in the workgroup. ■ **Route to Workgroup Fax.** CCA routes the incoming fax interactions to the best available agent in the workgroup.
Agent	Click Agent, select an agent from the drop-down list (so that CCA routes callers to that agent), and then click one of the following: ■ **Route to Agent Phone.** CCA routes the call to the agent's telephone. ■ **Route to Agent Fax.** CCA routes the incoming fax interactions to the agent's workstation.
Menu	Click Menu and then select a menu from the drop-down list (so that CCA routes the caller to that touch-tone menu). **TIP:** For more information on how to create touch-tone menus that callers can use to navigate to the contact center, see "Creating Project Menus" on page 213.
Campaign	Select this option to route calls to a campaign. **TIP:** For more about campaigns, see Chapter 11, "Campaign Overview."

NOTE: Only workgroups, agents, project menus, and campaigns that belong to the current partition appear in the drop-down list.

7 Click the Prefix Routing subtab, if prefix routing groups exist for the project.

NOTE: Prefix Routing Groups will not appear in a phone project if there is only one phone project for the company.

TIP: For more information on how to create them, see "Creating a Prefix Routing Group Library" on page 145.

a   Follow the instructions beginning with "Routing Phone Interactions Based on the Caller's Number" on page 299.

8 Click the Options subtab.

a Use the information in the following table to complete the Options subtab, and click OK:

Field	Description
Menu played before voicemail	From the drop-down list, select the menu to trigger before the caller leaves a voicemail for an agent. (This gives the caller a chance to re-enter the contact center before leaving a voicemail message.)
Menu played after voicemail	From the drop-down list, select the menu to trigger after the caller leaves a voicemail for an agent. (This feature allows the caller to reenter the contact center after leaving a voicemail message. **NOTE:** If you do not specify a menu, after the caller leaves a voicemail message, CCA will disconnect the caller. CCA plays the menu only for callers who reach an agent's voicemail, for the following reasons: ■ The agent did not answer. ■ The agent intentionally sent the caller to voicemail after accepting the interaction. (Callers who decide to leave a voicemail instead of waiting in a workgroup queue do not hear the menu.) **TIP:** For more information, see "Allow customer to leave a voicemail" on page 208. The drop-down list does not show any selections unless you already created them. **TIP:** See "Creating Project Menus" on page 213.
Enable Follow Me	Select to play the anotherlocation.wav prompt, which enables the caller to try to reach an agent at the forwarding numbers. **TIP:** For more information on how to define forwarding numbers for an agent, see "Activate Follow Me" on page 193. **NOTE:** If Follow Me numbers for the agent do not exist, CCA routes the caller directly to the agent's voicemail.
Enable Customer Priority Rating	Select so that CCA uses Customer Priorities in this project. **TIP:** To create customer priorities, see "Prioritizing Phone Customers" on page 349. The customer priority can change how long the customer spends waiting to reach an agent. CCA routes the customers with higher priority to agents before lower-priority customers (even if the lower-priority customer reached the contact center first). **NOTE:** If a customer reaches the contact center and the customer is not on the list, CCA gives the customer the lowest priority by default.

Field	Description
Whisper Prompt to Agent	From the drop-down list, select the prompt only the agent hears when accepting an incoming call. **TIP:** For more information on how to create whisper prompts, see "Process of Creating a Custom Prompt" on page 154.
Use Existing Interaction ID	This option does not appear for every application. (This is a company-specific field that integrates with a separate database.)

Routing Phone Interactions Based on the Caller's Number

By adding Prefix Routing Groups to a project, CCA routes calls based on the caller's phone number.

TIP: See "Creating a Prefix Routing Group Library" on page 145.

TIP: See "Creating a Prefix Routing Pattern Library" on page 146.

To route phone interactions based on the caller's number

1. Create projects to handle routed calls.

   TIP: See "Creating a Project Definition" on page 291 and "Process of Adding Phone Interactions to a Project" on page 294.

2. Click Options, Projects, the Phone tab, and then the Prefix Routing subtab.
3. Select the Enable Phone Project check box. Additional selections appear.
4. In the Name column, select a prefix routing group.
5. In the Projects drop-down list, select a project.

   Depending on which option you select, one of the following occurs:

   - When CCA receives a call matching the Prefix Routing Group, CCA routes the call to the project identified in the drop-down list.
   - If your project uses more than one Prefix Routing Group, CCA uses the first Routing Group matching the call. For example, the first Prefix Routing Group matches the phone numbers with the pattern 858* and 619*, and the second Routing Group matches the numbers with the pattern 619*. CCA always executes the first Routing Group.

6. Click the Route caller to tab and complete the Route caller to tab to select a routing action for calls that do not match your Prefix Routing Groups, and click OK.

   TIP: See Step 5 on page 295 for information on completing the Route Caller to tab.

Setting Up Shared-Number Phone Projects for Scheduling

Though no two phone projects can have the same phone number, you can use the same phone number for different projects scheduled to run at different times.

TIP: See "Setting Up Project Schedules" on page 343.

In this situation, customers dial the same number at all times, but the scheduled projects route the call differently depending on the time of day, or the day of the week on which the call is placed.

Defining shared-number projects for scheduling requires that you supply the true phone number for only one scheduled project, and that you initially supply None (if you have permission) or a dummy phone number for the additional Scheduled Projects that share the same number.

To set up shared-number phone projects for scheduling

1. Create a phone project that defines the first routing strategy that you want to schedule and that specifies the phone number customers dial to reach the project.
2. Create additional phone projects that define alternate interaction routing-strategies to schedule, but do not supply the actual phone number for the project. Instead, do one of the following:
   - If you have permission, select None for the phone number.
   - Supply a dummy phone number (such as, add 0 [zero]) to the beginning of the phone number in Step 1 for these projects.
3. Create schedules to start each of the projects defined in Step 1 and Step 2.

   TIP: See "Setting Up Project Schedules" on page 343.
4. When defining the schedules, specify a phone number to replace the empty phone number (dummy) while the scheduled project is active.

NOTE: When using two DNIS numbers, after the schedule activates, CCA resets the phone number of the original project to "none." With the phone number as "none," the project will no longer appear in the schedule. You must re-enter the project phone number each time the schedule activates.

Adding Predictive Calling to a Project

A *predictive project* makes automated, outgoing calls to customers (or prospective customers), and connects the customer to an agent who has configured IM to accept the predictive interactions. Configure a predictive project the same as a preview project.

NOTE: Each agent must provide an outcome for the predictive project. Therefore, make sure to update each agent to enable outcome reporting.

From AM, you control the following:

- Number of predictive calls to dial simultaneously
- Agent scripts to associate with the project

- Actions to take for each possible predictive call result
- Number of agents to leave available for inbound phone project calls
- Predictive project state (on or off)

AM support for predictive dialing is powerful and customizable. To benefit the most from this topic, you must have:

- Set up other types of projects previously (such as email, phone, and so on)
- Have a basic understanding of Display Templates.

  TIP: See "Process of Creating a Display Templates Library" on page 96.

- Have a basic understanding of Dialer Lists.

  TIP: See "About Dialer lists" on page 305.

To add predictive calling to a project

1. Click Options and then Projects. A list of project appears.
2. Click a project to set up, and then click Edit. The Edit Project screen appears.
3. Select the Predictive tab.
4. Select the Enable Predictive Project check box. Additional fields appear.
5. Click the Options subtab.
6. From the Priority drop-down list, select the level to assign to interactions reaching this predictive project.
7. CCA routes interactions with a high-priority project to an agent in a workgroup before routing low-priority project interactions to an agent in the same workgroup.From the Select a Workgroup drop-down list, select the workgroup to handle the predictive calls.
8. Use the information in the following table to complete the settings in the Options subtab:

Field	Description
Set the minimum number of agents to keep available for inbound calls.	Type the number of agents that must be available to handle inbound phone project calls before dialing predictive numbers. For example, if you type the number 5 and there are six agents available, CCA reserves five of the agents for receiving inbound calls. Only one agent receives predictive dialer calls.
Set the number of maximum voice channels to use for this project	Type the maximum number of predictive numbers to dial simultaneously. (This number cannot be greater than the number of physical channels that are available for dialing.)

Field	Description
Associate this predictive project with these screen pops	From the Script drop-down list, select the script content to display on the agent's screen when the agent is successfully connected to a predictive call.
Script FAQ	From the FAQ drop-down list, select the FAQ content to display on the agent's screen when the agent is successfully connected to a predictive call.
Predicting Mode	Select one of the following to identify how CCA determines whether to add an agent to the pool of agents who can receive predictive calls: ■ **Wrap Up**. CCA adds the agent to the pool if the agent's status is Wrap Up or Available. (This is recommended option.) ■ **Agent Availability**. CCA adds the agent to the pool only if the agent's status is Available. ■ **Estimated Wait Time**. The Dialer looks at the Estimated Call Handle Time, Wrap up and abandon rate, and then makes calls based on a forecasted, agent-availability rate.
Maximum number of retries for a Callback	Type the number of times that CCA attempts to reach a contact record that is marked as a callback.
Play Notification Beep to Agent	Select this option so that the agents hear a short beep when they connect to a predictive call.

9 Select the Regulations subtab.

10 Use the information in the following table to set the ring time and tone detection:

Field	Description
Set Ring Time	From the drop-down list, select how long (in seconds) to ring the contact before disconnecting.
Select Tone Detection	From the drop-down list, select how long CCA waits (in seconds) to determine whether the call was answered by a person or an answering machine. (CCA determines this by running an algorithm.) **NOTE:** The more time the algorithm has to work, the less likely it is that CCA will connect agents, by mistake, to an answering machine. **NOTE:** However, if the number is too high, a customer answering the phone might have to wait for a second or two before CCA connects the customer to an agent.

11 Select the Dialer Ratio tab.

The dialer ratio is defined as:

The number of predictive calls made for a specified time divided by the number of predictive calls answered in that specified time.

12 Use the information in the following table to complete the fields:

Field	Description
Pacing Mode or Fixed Mode	Do one of the following: ■ Select Pacing Mode to dynamically change the rate at which CCA places predictive calls. This rate is based on a number of parameters, such as the failure rate of predictive call attempts and the drop ratio. ■ To set a fixed predictive call rate, choose Fixed Mode. **TIP:** See “Fixed Mode” on page 304.
Maximum Dropped Calls Rate	Type the maximum percentage of dropped predictive calls to allow.
Sampling Size for pacing algorithm	From the drop-down list, select the number of predictive call attempts to consider when adjusting the pacing algorithm. **NOTE:** A smaller number results in considering only the most recent call attempts. A larger number results in considering more calls, but some of the least-recent calls might not reflect the current calling conditions.
Agent Aggressivity Factor	Type an Agent Aggressivity Factor (AAF) number to modify the dialer ratio. For example, if the dialer is using a ratio of 3, and the AAF is set to 0.5, the dialer can use a new ratio of (3 x 0.5 = 1.5). The AAF value must be between 0.1 and 10. The default setting is 0.66. The AAF works in combination with the minimum pool size.
Pool Aggressivity Factor	Type a Pool Aggressivity Factor (PAF) number for modifying the dialer ratio. For example, if the dialer is using a ratio of 2 and the PAF is set to 0.5, the dialer can use a new ratio of (3 x 2 = 6). The PAF value must be between 0.1 and 10. The default setting is 0.75. The PAF works in combination with the Minimum Pool Size (see the next field).

Field	Description
Minimum Pool Size	Type the Minimum Pool Size (MPS), which determines whether the dialer ratio is multiplied by the Agent Aggressivity Factor or the Pool Aggressivity Factor. If the number of agents who can receive predictive calls is greater than or equal to the Minimum Pool Size, CCA multiplies the dialer ratio by the Pool Aggressivity Factor. If the number of available agents is less than the Minimum Pool Size, CCA multiplies the dialer ratio by the Agent Aggressivity Factor. The MPS value must be between 0 and 99. The default setting is 4.
Fixed Mode	Click to determine the number of predictive call attempts to place based on the number of agents available at each hour of the 24-hour day. Then, type the number of predictive calls to make for each available agent during each interval of the day. For example, if the likelihood of a successful predictive call at 12:00 P.M. is low, enter a large number to increase the chances of a successful predictive call. If the likelihood of successful predictive calls at 7:00 p.m. (19:00) is high, enter a lower number.

13 Select the Actions subtab.

For each condition (If Busy, If No Answer, and so on) select an action for CCA to take. (Notice that new fields appear after making a selection.)

NOTE: Not all actions are available for a specific condition. For example, the only actions available for If Busy are: Out of List or Callback.

14 Use the information in the following table to complete the fields:

Action	Description
Call back	Select to call the number back later. Then, from the drop-down list (*Days* column), choose the number of days from today to place the callback. From the drop-down list (Hour column), select the time to place the callback.
Callback message	Select to leave the selected message and call the number later. Then, from the drop-down list (Days column), choose the number of days from today to place the callback. From the drop-down list (*Hour* column), select the time to place the callback.
Connect Agent	Connect the called number to an agent. You can also select an action to take if no agent is available.

Action	Description
Leave message	Select to leave a message. Then, from the drop-down list, select the message to leave. **NOTE:** At least one company prompt must exist before using this action. **TIP:** See "Creating a Company Prompt Library" on page 92.
Out of List	Select to remove the number from the predictive project so CCA will not dial it again.
Route to Project	Select to send the call to a specific project. Then, from the drop-down list, select a project.
Send Fax	Select to send a fax. Then, from the drop-down list, select the fax to send. **NOTE:** At least one fax must exist before using this action. **TIP:** See "Creating a Fax Library" on page 125.

15 Select the Permissions subtab. Do one of the following:

a Select a check box next to a supervisor's name so that the supervisor can see this project name and dialer list when logging in to SM. In addition, the supervisor can start and stop dialing from the list.

b Do not select a supervisor's check box so that the supervisor cannot see this project when logging in to SM. In addition, the supervisor cannot start the predictive dialing for the project.

About Dialer lists

A *dialer list* is a CSV (comma separated variable) file that contains the names and phone numbers of customers to call in a predictive project. There are only a few restrictions on what a dialer list looks like:

- The Dialer List must be in CSV format.
- The Dialer List must have at least one column containing phone numbers and at least one column for the country code.

  NOTE: CCA copies only the fields that you map from the dialer list CSV file into the CCA database. You can map as many or as few fields as you want. However, you must map at least one phone field. If you do not map a field, agents cannot see it when they connect to a predictive call.

  NOTE: The names of the columns in the dialer list are not important. What matters is the data in those columns and which Contact Template fields you map them to.

  NOTE: Each phone number field in the Mapping dialog box has two parts. The first part is for a dialing prefix (such as 1) - if a separate column exists in the dialer list. The second part is for the main part of the number (such as 5551212).

Adding a Dialer List to a project consists of the following:

1. Tell CCA where the CSV file resides on the hard drive.
2. Set the Select fields list boxes.
3. Map the columns in the Dialer List to the fields in the Contact Template that the project uses.

Process of Uploading a Dialer List

Before uploading a dialer list, the following must exist:

- A dialer list, in CSV format, with at least one column of phone numbers
- A company and a project

Uploading a Dialer List

To upload a dialer list

1. Click Options, Projects, and then the Dialer Lists tab.
2. Click Plus. The Add Dialer List dialog box appears:
   a. Type a name for the dialer list.
   b. Click Import New List, Browse, and then find the CSV file.
3. Click Next. The Map Fields to This Contact Template screen appears.
4. Associate the columns in the dialer list with fields in the Contact Template.

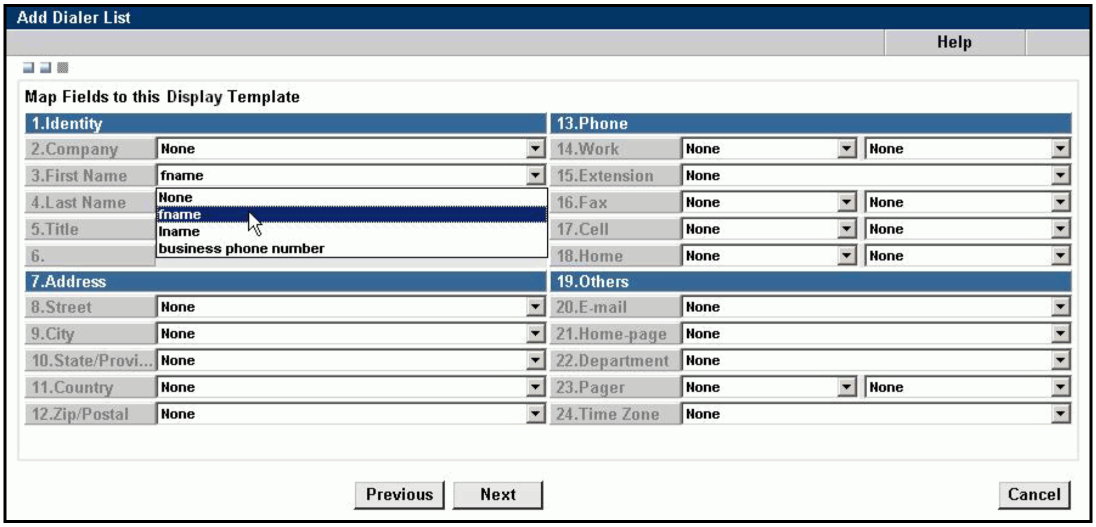
   This is an important step, because it is the only way AM has of determining the data in the dialer list. The following example dialer list has only three fields: fname, lname, and business phone number. So, those are the only fields that you map.

	A	B	C
1	fname	lname	business phone number
2	Steve	Smith	5551212
3	Mike	Jones	5551212
4	Carla	Carluchi	5551212
5	Woody	Ellis	5551212
6			

Notice in that:

- The gray fields are from the Contact Template that the project uses.
- The fields in the list boxes are from the columns in the dialer list.

a Click the list box next to First Name. All of the columns in the dialer list appear.



As an example, see the following table make the following map:

Contact Template Field	Dialer List Column
First Name	fname
Last Name	lname
Work	business phone number

b Click Next and then click Upload.

c After the dialer list finishes uploading, click Close Window. The CSV file appears in the Dialer List tab.

5 Set the Select Field list boxes at the top of the Dialer List tab. The Dialer List upload is complete.

Process of Starting and Stopping a Predictive Project

Before you can start or stop a predictive project, a number of conditions apply:

- Conditions for Predictive Dialing on page 308.
- Agent Conditions on page 308.
- Supervisor Conditions on page 308.
- Administrator Conditions on page 308.
- Company Conditions on page 309.

After meeting the various conditions, then you can perform the following:

- Starting a Predictive Project Manually on page 309.
- Stopping a Predictive Project Manually on page 309.
- Creating a Predictive Dialing Schedule on page 309.

Conditions for Predictive Dialing

Before predictive dialing can start, you must meet several conditions. When starting a predictive project in AM, you are telling the server:

- Look at all the conditions required for predictive dialing to start.
- If all of the conditions are true, start dialing.

Agent Conditions

The following agent conditions apply:

- At least one agent must be available to receive predictive calls.
- The available agents must be logged in to IM and logged in to a predictive project.

  NOTE: Agent conditions can vary, depending on what actions are set for predictive dialing. See page 304 for more information.

Supervisor Conditions

A supervisor must start at least one dialer list in SM.

Administrator Conditions

The following administrator conditions apply:

- The available agents must be associated with the workgroup that the predictive project uses.

  TIP: Chapter 9, "Setting Up Workgroups."
- Supervisors must have permissions to use a dialer list.

  TIP: Chapter 8, "Creating Administrator, Agent, and Supervisor Accounts."
- The company must have the predictive feature enabled.

  TIP: Chapter 5, "Adding and Editing a Company."
- The predictive project must be started in AM (either manually or using a Start/Stop Schedule).

  TIP: Chapter 16, "Setting Up Project Schedules."

- There must be some numbers in at least one dialer list that are available to be called. (For example, some numbers that have not already been called, or marked as, Do Not Call.)

  TIP: "Setting Up Shared-Number Phone Projects for Scheduling" on page 300.

- At least one dialer list must have been uploaded to the project.

  TIP: "Process of Setting Up Predictive Dialing Schedules" on page 310.

Company Conditions

The following company condition applies: the company must have a predictive license. If you set up a project without a license, the dialer will not function unless the company has purchased a predictive license from Oracle.

Starting a Predictive Project Manually

When starting a predictive project manually, CCA tries to dial all numbers in the project's dialer lists. To dial only selected numbers or to make calls at specific times, you must create a Start/Stop Schedule. (See "Creating a Predictive Dialing Schedule" on page 309.)

To start a predictive project manually

1. Click Options, Projects, Predictive, and then the Start/Stop Schedule subtab.
2. Click Manual Start/Stop.
3. Click Start.

Stopping a Predictive Project Manually

You can easily stop a predictive project.

To stop a predictive project manually

1. Select Options, Projects, Predictive, and then the Start/Stop Schedule subtab.
2. Click Manual Start/Stop.
3. Click Stop.

Creating a Predictive Dialing Schedule

You can create a predictive dialing schedule using a Prefix Routing Group.

To create a predictive dialing schedule

1. Select Options, Projects, Predictive, and then the Start/Stop Schedule subtab.
2. Click Scheduled Start/Stop.
3. Click Plus. The Weekly Predictive Scheduling dialog box appears.
4. Type a name for the schedule.
5. Under Select a Prefix Routing Group, select to dial only those numbers that match a specific pattern:
   a. Choose Use Phone for Matching to call people whose phone number matches a specific pattern.
   b. Choose Use Contact Customized field for matching to call people that match another pattern (such as income, State, ZIP code, and so on).

      TIP: For examples showing how to dial all numbers or only selected numbers in a dialer list, see page 311.
6. From the Days drop-down list, select the days that the predictive dialing schedule runs (such as Monday through Friday).
7. From the Daily Hours drop-down list, select when the predictive dialing schedule runs (such as 8:00 to 5:00).
8. From the Time Zone drop-down list, select where the project runs, and click OK to save the schedule.
9. In the Predictive tab, click OK.

Process of Setting Up Predictive Dialing Schedules

These examples take you step-by-step through the entire process of setting up the predictive dialing schedules. Going through these examples helps you to understand how predictive schedules work and why they are so useful.

Create a sample dialer list in a spreadsheet program, and save it in CSV (Comma Separated Variable) format. A sample dialer list can be as simple as Figure 20:

	A	B	C	D
1	First Name	Last Name	Phone	
2	Steve	Smith	16195225110	
3	Mike	Jones	17605430990	
4				
5				

Figure 20. Simple Dialer List CSV

The following examples show how to set up projects for:

- Dialing All Numbers in the Dialer Lists on page 311.

- Dialing Only Selected Area Codes on page 312.
- Creating a Start/Stop Schedule That Calls Customers Only If They Are in a Specific Time Zone on page 314.

Dialing All Numbers in the Dialer Lists

This example shows how to do pattern matching against phone numbers.

To dial all number in the Dialer Lists

1 Create a Prefix Routing Pattern:

  a Click Libraries, Prefix Routing Patterns, and then Add. The Add Prefix Routing screen (Figure 21) appears.

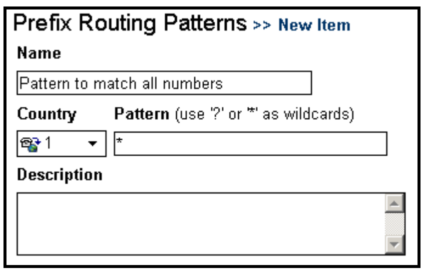


Figure 21. Prefix Routing Patterns

  b Under Name, type `Pattern to match all numbers`.

  c Under Pattern, type an asterisk (*****).

  d Click OK.

2 Create a Prefix Routing Group:

  a Click Libraries, Prefix Routing Groups, and then Add. The Add Prefix Routing Groups screen appears.

  b Under Name, type `Group to match all numbers`.

  c Click All (next to Select the prefix patterns for this Group).

  d Click OK.

3 Create a Start/Stop Schedule:

  a Click Options, Projects, and then Add. The Add Project screen appears.

  b Click the Predictive tab, and then select Enable Predictive Project.

  c Click the Start/Stop Schedule subtab, the Scheduled Start/Stop, and then Plus. The Weekly Scheduled Start/Stop dialog box appears.

  d Under Name, type `Dial All Numbers`.

- **e** Under Select a Prefix Routing Group, select Use Phone for Matching and choose Group to match all numbers.
- **f** From the drop-down lists, select the Days, Daily Hours, and Time Zone for the schedule.
- **g** Click OK to save.
- **h** In the Predictive tab, click OK.

4 Upload a dialer list. (For this example, use a simple dialer list with the following columns: First Name, Last Name, and Phone.)

- **a** Click Options, Projects, and then Edit. The Edit Projects screen appears.
- **b** Click the Dialer Lists tab.
- **c** From the Select Phone field, drop-down list, choose Work.
- **d** From the Select Last Name field drop-down list, choose Last Name.
- **e** From the Select First Name field drop-down list, choose First Name.
- **f** Click Plus. The Add Dialer List dialog box opens.
- **g** In the General box, type a name for the list.
- **h** In the Description box, type a description for the list.
- **i** Click Browse to locate and load the dialer list file.
- **j** Click Next. The Dialer List dialog box refreshes to show the Mapping Dialer List Columns to the Display Template dialog box.
- **k** Associate the columns in the dialer list with the fields in the Contact Template.

  This is an important step, because it is the only way AM has of determining the data in the dialer list. This example dialer list has only three fields, so those are the only ones that you map.

  NOTE: Map the Phone column in the dialer list to the Work Phone field in the Contact Template.
- **l** Click Next, and then click Upload.
- **m** After the dialer list finishes uploading, click Close Window.

The Start/Stop Schedule is complete.

Dialing Only Selected Area Codes

This example shows how to create a Start/Stop Schedule that calls customers only if they are in San Diego County (pattern matching against a phone field). This project uses the System Contact Template from Options, Project, Name, and then the Select Display Template for this Project drop-down list.

To dial only selected areas

1 Create a Prefix Routing Pattern:

a. Click Libraries, Prefix Routing Patterns, and then Add. The Add Prefix Routing Patterns screen appears.

b. Under Name, type `South San Diego 619*`.

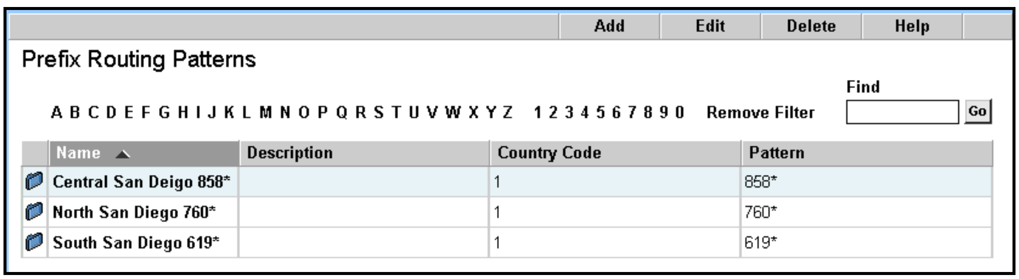
c. Under Pattern, type `619*`.

d. Click OK.

e. Create two more patterns:

   - Name: Central San Diego 858* and Pattern: 858*
   - Name: North San Diego 760* and Pattern: 760*

   The following figure shows the three prefix patterns for San Diego.



2. Create a Prefix Routing Group.

   a. Click Libraries, Prefix Routing Groups, and then Add. The Add Prefix Routing Groups screen appears.

   b. Under Name, type `San Diego County Area Codes`.

   c. Click All.

   d. Click OK.

3. Create a Start/Stop Schedule:

   a. Click Options, Projects, and then Add. The Add Projects screen appears.

   b. Click the Predictive tab and then click Enable Predictive Project.

   c. Click the Start/Stop Schedule subtab.

   d. Select the Scheduled Start/Stop option. Additional fields appear.

   e. Click Plus.

   The Weekly Predictive Schedule dialog box appears.

   f. Under Name, type `Dial San Diego County Numbers`.

   g. Under Select a Prefix Routing Group, select Use Phone for Matching and choose San Diego County Area Codes.

   h. From the drop-down lists, select the Days, Daily Hours, and Time Zone for the schedule.

   i. Click OK to save the schedule.

j. In the Predictive tab, click OK.

4. Upload a dialer list. For this example, use a simple dialer list with the following columns: First Name, Last Name, Country Code and Phone.

   a. Click Options, Projects, and then Edit. The Edit Projects screen appears.

   b. Click the Dialer Lists tab. The Dialer Lists screen appears.

   c. From the Select Phone field drop-down list, choose Work.

   d. From the Select Last Name field drop-down list, choose Last Name.

   e. From the Select First Name field drop-down list, choose First Name.

   f. Click Plus. The Weekly Predictive Schedule dialog box appears.

   g. Type a name for the dialer list.

   h. Click Browse to locate to locate and load the dialer list file.

   i. Then, click Next.

      The Dialer List dialog box refreshes to show the Mapping Dialer List Columns to the Display Template dialog box.

   j. Associate the columns in the dialer list with the fields in the Contact Template.

      This is an important step, because it is the only way AM has of determining data in the dialer list. This example dialer list has only four fields, so those are the only ones that you map.

      NOTE: Map the Phone column in the dialer list to the Work Phone field in the Display Template.

   k. Click Next, and then click Upload.

   l. After the dialer list finishes uploading, click Close Window.

   The Start/Stop Schedule is complete.

Creating a Start/Stop Schedule That Calls Customers Only If They Are in a Specific Time Zone

This example shows how to create a Start/Stop Schedule that calls customers only if they are in a specific time zone. For this example, use a simple dialer list that looks like Figure 22.

	A	B	C	D	E
1	First Name	Last Name	Phone	Time Zone	
2	Steve	Smith	16195225110	Eastern	
3	Mike	Jones	17605430990	Central	
4	Carla	Carluchi	16194578282	Mountain	
5	Woody	Ellis	18582124067	Pacific	
6					

Figure 22. Example 3: Dial Only Selected Time Zones

Dialing selected time zones (pattern matching against a nonphone field) has one more step than dialing selected phone numbers (pattern matching against a phone field). You must add a pattern matching field to the Contact Template that the project uses.

When uploading a dialer list, map the columns in the dialer list to the Contact Template that the project uses.

To create a start and stop schedule that calls customers only if they are in a specific time zone

1. Click Options, Projects, and then Add. The Add Project screen appears.
2. In the General tab and from the Select Display Template for this Project drop-down list, select Contact Template.
3. Mapping the columns in the dialer list to the fields in the Contact Template helps CCA interpret the data in the dialer list. For example, CCA needs some way of determining that a column in the dialer list contains phone numbers, and that is the column that CCA uses for dialing.

To do pattern matching against a nonphone column in the dialer list

For example, CCA dials selected time zones, rather than selected phone numbers.

1. Add a new field to the Contact Template. Assign the field an action type of Pattern Matching.
2. Upload the dialer list and map the string column (time zone) in the dialer list to the Pattern Matching field on the Contact Template.

   This procedure CCA: *I want to call customers only if they match a specific pattern in one of the columns of my dialer list.*

Process of Using a Dialer List

You must perform the following steps before using a dialer list:

1. Creating a Matching Pattern on page 315.
2. Creating a Pattern Matching Group on page 316.
3. Creating a Start and Stop Schedule on page 316.
4. Modifying the System Contact Template on page 316.
5. Uploading a Dialer List on page 317.

Creating a Matching Pattern

Create a matching pattern to match the data in the dialer list to the map you create.

To create a matching pattern

1. Click Libraries, Matching Patterns, and then Add. The Add Matching Patters screen appears.
2. Under Name, type `Pattern for pacific time zone`.
3. Under Pattern, type pacific, and click OK.

Creating a Pattern Matching Group

Create a pattern matching group and identify all patterns that belong.

1. Click Libraries, Pattern Matching Groups, and then Add. The Add Pattern Matching Groups screen appears.
2. Under Name, type `Pacific Time Zone Pattern Group`.
3. Click All and then click OK.

Creating a Start and Stop Schedule

Create a schedule to control when the product begins and ends.

To create a start and stop schedule

1. Click Options, Projects, and then Add. The Add Projects screen appears.
2. Click the Predictive tab, and then click Enable Predictive Project.
3. Click the Start/Stop Schedule subtab.
4. Click Scheduled Start/Stop.
5. Click Plus. The Weekly Predictive Schedule dialog box appears.
6. Under Name, type `Call Customers in Pacific Time Zone`.
7. Under Select a Prefix Routing Group, select Use Contact Customized field for Matching and choose Pacific Time Zone Pattern Group.
8. From the drop-down lists, select the Days, Daily Hours, and Time Zone for the schedule.
9. Click OK to save the schedule.
10. In the Predictive tab, click OK.

Modifying the System Contact Template

To simplify the task, the project uses the System Contact Template. In a real contact center, create a custom Contact Template for the project.

To modify the system contact template

1. Click Libraries and then Display Templates. A list of display templates appears.
2. Double-click System Contact. The Edit Display Templates screen opens.
3. Click the Layout tab.
4. Double-click an unused field. The Defined Label dialog box appears.
   - In the right column, type `Time Zone` as the field name.
   - From the Associate Label with Action drop-down list, choose Pattern Matching.
   - From the field Name drop-down list, choose one of the contacts.field0X fields not previously used. (These are extra fields that CCA includes in the Contacts table for customer use.)
   - Click OK to close the dialog box.
   - Click OK to save your changes to the template.

Uploading a Dialer List

For this example, use a simple dialer list with the following columns: First Name, Last Name, Phone, Country Code, and Time Zone.

To upload a dialer list

1. Click Options, Projects, and then Add. The Add Project screen appears.
2. Click the Dialer Lists tab.
   - From the Select Phone field drop-down list, choose Work.
   - From the Select Last Name field drop-down list, choose Last Name.
   - From the Select First Name field drop-down list, choose First Name.
   - From the Select Pattern Matching field drop-down list, choose Time Zone.
3. Click Plus:
   - Type a name for the dialer list.
   - Click Browse to locate your dialer list and then click Next. The Mapping screen appears.
   - Use the Map Fields to This Display Template screen to associate the columns in the dialer list with fields in the Contact Template.

     This is an important step, because it is the only way AM has of determining the data in the dialer list. This example dialer list has only five fields, so those are the only ones that you map.

     NOTE: Map the Time Zone column in the Dialer List to the Time Zone field in the Display Template.
   - Click Next, and then click Upload.

- After the dialer list finishes uploading, click Close Window.

The Start/Stop Schedule is complete.

About Predictive Call Results and CCA Actions

Table 52 shows the possible results from a predictive call attempt and the actions CCA takes in response to the predictive calls. It is possible to create a report that breaks down the number of each predictive call result. For more information on how to create the Predictive Summary Report, see the *Contact Center Anywhere Report Guide.*

Table 52. Predictive Call Results and Descriptions

Result	Description
Answer	A person answered the predictive call.
Answering Machine	An answering machine answered the predictive call.
Busy	The predictive call resulted in a busy signal.
Error	An error (no dial tone, no line available, and so on) prevented CCA from placing the predictive call.
Fax	A fax machine answered the predictive call.
Invalid	The number used for the Predictive call was out of service or not a valid number.
No Answer	There was no answer at the number dialed.

Table 53 shows the possible actions that CCA takes after a predictive call result. You can create a report that displays the actions taken for all predictive calls attempted by the project.

TIP: For more information on how to create the Predictive Detailed Report, see the *Contact Center Anywhere Reports Guide*.

Table 53. CCA Action and Description

Action	Description
Call Back	CCA will call this number back at the specified time.
Call not connected	An answering machine answered the predictive call.
Connected	The predictive call was connected with an agent.
Failed to send fax	An attempt to send a fax was unsuccessful.
Fax file not found	The .TIF file to be faxed could not be found at the specified location.

Table 53. CCA Action and Description

Action	Description
Fax sent	CCA sent the specified fax to the fax machine that answered the predictive call.
Left message and will call back	CCA left the specified message on the answering machine that answered the predictive call and CCA will call this number back at the specified time.
License not available	No license is available to permit connection of the predictive interaction to an agent. (Contact the vendor to purchase a license for additional interactions.)
Message on the answering machine	CCA left the specified message on the answering machine that answered the predictive call.
Remove from list	The number was removed from the predictive database and CCA will not call it again.

Process of Running the Clean List Tool for a Do Not Call List

- CCA supplies a standalone Clean List Tool for adding and cleaning the Federal Trade Commission (FTC) Do Not Call (DNC) List to your CCA database. You can use the Clean List Tool only with a DNC list in .csv format. CCA does not support the XML format.
- You must have already created at least one predictive project.
- The Clean List Tool assumes that your DNC list does not contain duplicate phone numbers. (The utility fails if it finds duplicate numbers in the DNC list. The utility does not report an error message if it fails when finding duplicate phone numbers.)

This process includes:

1. Starting the DNC Clean List Tool on page 319.
2. Uploading a DNC List for the First Time on page 320.
3. Uploading a DNC Change List on page 321.

Starting the DNC Clean List Tool

This tool might take minutes or even hours to run, depending on:

- Whether you are uploading the DNC list for the first time or running an update. (For example, in 2004, the DNC list had over 60 million records and took hours to run.)
- The number of contacts in the Predictive Contacts table.
- The computer hardware and network speed.

To start the DNC Clean List Tool

1. Use AM to stop the predictive projects.
2. Start a browser, and enter this URL: `http://<hostname><:port>/taw/DoNotCall/`

   The Login screen opens.
3. Enter the login information:
   - If you log in as the network administrator, all predictive projects for all companies appear.
   - If you log in as the system administrator, all predictive projects for only your company appears.

Uploading a DNC List for the First Time

Uploading a DNC list for the first time is a two-step process.

- First, the utility uploads the entire DNC list to the CCA database.
- Second, the Clean List Tool removes DNC numbers from the predictive project contact lists. It also removes DNC numbers from preview projects that do not include a predictive project.

To upload the DNC list for the first time

1. Start the utility and log in.
2. Select Import Initial List.
3. In the text box, type a valid UNIX- or Windows-based file path.

   Your DNC list must be on your CCA Web server machine in a directory that the Web server can access.

   NOTE: To ensure that the entire list is updated in the database, you must upload the list from the Web server, not from your local machine. Therefore, before uploading, save a copy of the list on your Web server. (If the list is not updated from the Web server, the entire list might not be updated in the database.)
4. Click Submit.

   NOTE: Uploading a DNC list for the first time will take several hours, at least.
5. When the DNC list finishes uploading, click Update the Predictive Contact Table. The Predictive Contact Table screen appears.
6. In the left pane, under Projects Available to Clean, select one or more predictive projects or preview projects (preview projects that do not include a predictive project appear on the list, as well), and then click Update Database.
   - The utility temporarily moves the selected projects to the right pane to indicate that they are being worked on.
   - The utility removes any phone number in a project you selected if it finds the number in the DNC list.

- After updating all of the projects you selected, they are removed from the Projects Being Cleaned pane.

7 Close the browser that was running the DNC utility.

The phone numbers in your predictive projects are updated.

Uploading a DNC Change List

Follow these steps if you already uploaded the initial DNC list and want to upload a DNC change list. Uploading a DNC change list is a two-step process:

- First, the utility uploads the DNC change list to your CCA database.
- Then, the utility removes the DNC numbers from your predictive project contact lists and from any preview projects that do not include a predictive project.

To upload a DNC change list

1 Start the utility and log in.

2 Select Upload a Change List.

NOTE: To ensure that the entire list is updated in the database, you must upload the list from the Web server, not from your local machine. Therefore, before uploading, you must save a copy of the list on your Web server. (If the list is not updated from the Web server, the entire list might not be updated in the database.)

3 In the text box, type a valid UNIX or Windows based file path.

NOTE: Your DNC change list must be on your CCA Web server machine in a directory that the Web server can access.

4 Click Submit.

5 After the DNC list finishes uploading, select Update the Predictive Contact Table.

6 In the left pane, under Projects Available to Clean, select one or more predictive projects or preview projects (that do not include a predictive project), then click Update Database.

The following events occur:

- The utility temporarily moves the selected projects to the right pane, to indicate that they are being worked on.
- The utility removes any phone number in a project you selected, if it finds the number in the DNC list.
- When all of the projects you selected finish updating, they are removed from the Projects Being Cleaned pane.

7 Close the browser that was running the DNC utility.

The phone numbers in your predictive projects and preview projects (that do not include a predictive project) are updated.

Process of Adding Chat Interactions to a Project

Chat Projects handle Web-based chat requests so you can control:

- How to route the chat request
- The Web pages to display to the customer while CCA handles the chat request
- The Web page content to provide to agents for sending to customers

This process includes:

- Setting Up a Chat Project on page 322.

Setting Up a Chat Project

Set up a chat project to handle Web-based chat requests.

To set up a chat project

1. Click Options, Projects, the Project to set up, and then click Edit. The Edit Project screen appears.
2. Click the Chat tab, and then click Enable Chat Project. The screen opens to the Push pages subtab.
3. Use the information in the following table to complete the fields:

Field	Description
Priority	From the drop-down list, select the priority level to assign to interactions reaching this chat project. **NOTE:** CCA routes the interactions to the workgroups and then to an agent through a project with high priority, before the interactions reaching the same workgroup through a project with a low priority.
Route Chat to Workgroup	From the drop-down list, select the workgroup containing the agents who will handle the chat requests coming into this project. **NOTE:** YOu must select a workgroup before you can enable parameter extension for third-party application integration.
Script FAQ	From the drop-down lists, select the script and FAQ URLs to display on the agent’s screen upon receiving the chat interaction.

Field	Description
First Push Page	From the drop-down list, select the Web page to display to the customer after the customer submits the chat request and while CCA attempts to connect the customer with an agent. (Typically, this content thanks the customer for the inquiry and indicates that the process of connecting to an agent has started) In the Duration text box, enter the length of time (in seconds) to display the first page before beginning the custom push page sequence.
Connected	From the drop-down list, select the Web page to display to the customer after successfully connecting to an agent.
Disconnected	From the drop-down list, select the Web page to display to the customer when the agent disconnects from the customer.
If No Agent Available	From the drop-down list, select the Web page to display to the customer if no agents are available to handle the chat request.
If Contact Center is Closed	From the drop-down list, select the Web page to display to the customer if the contact center is closed.

4 Under Define Chat Push Page Sequence:

a From the Page Names drop-down list, select a page to specify a sequence of custom push pages in addition to the required push pages.

Additional pages appear in a repeating sequence while the customer waits to be connected to an agent (meaning after the First Push Page, but before the Connected page appears).

TIP: For information on creating push pages for a chat project, see “Creating a URL Library” on page 150.

b In the Duration field, type how long to display the page (in seconds).

c Click Plus to add the selected push page to the sequence.

d Repeat steps 6 and 7 for all the push pages to show the customer waiting for a connection to an agent.

e To remove a push page from the sequence, click the page, and click Delete (the trash can icon).

5 Click the Chat Response subtab.

a Select the check box next to the Intelligent Chat Template to assign it to this project.

TIP: See “Creating an Intelligent Chat Template Library” on page 128.

b To assign all templates to the project, click All.

c To remove all templates from the project, click Clear.

6 Click the Collaboration subtab. If an agent has an active chat interaction, collaboration allows the agent to view and change the same Web page appearing to the customer.

a. Select the Enable Collaboration check box to enable the Collaboration button in the IM Chat tab.

   In this way, if the agent has an active chat interaction and clicks the Collaboration button, a nonmodal browser displays on the agent's machine, and loads the same Web page appearing to the customer. Note the following:

   - Collaboration works only with Web pages opened using the Web Chat page. For example, if the customer opens a new browser window, the agent cannot see it.
   - Both the agent and the customer view the same Web page and can see changes that the other person makes. If the agent enters text in a form field, the customer sees the text. The same is true if the customer enters text in a form field. Both the agent and customer can click Web links, and both see the new page when it loads.
   - If the agent closes the browser window, the customer's browser window does not close.
   - If the agent moves the mouse, the customer does not see the cursor move.

b. Select the Enable Collaboration Across Domain check box.

   - For security reasons, browsers do not allow scripting across domains. If the agent tries to load a page that is not on the same domain as IM, the agent can view the page, but cannot make any changes to the page. To avoid this security feature, select this check box, and resave the Request a Chat page. Therefore, the next time the customer opens the chat page, the customer can also download an ActiveX DLL. This feature allows the agent to interact with any Web page that the customer opens through the chat page, regardless of the domain.
   - Normally, when a customer opens the chat page, the customer sees a single browser window that is split into two frames. The frame on the left contains the chat screen. The frame on the right displays a Web page (such as a chat push page). By enabling Collaboration Across Domains, the customer has two separate browser windows: one for the chat screen, and one for the chat push page.

7. From the Enable Parameter Extensions drop-down list, select a parameter.
8. Make sure you identified the Workgroup where CCA will route chat and then click the Create Page button. A Chat Request Page opens.
9. Click the double-arrows located in the top right of the Cat Request Page. The Extended Parameters List opens showing the parameter display names from the Parameter Extension library.

   TIP: See "Creating a Parameter Extensions Library" on page 135.

10. Enter data for each extended parameter, up to the size configured. These parameters are available to the Interaction Manager and passed to the Script, FAQ, and Custom tabs.

    While requesting a Chat, CCA presents a set of questions to the user so that CCA can route the user to the best suited agent. In addition, the system may pass as many as five KB article information to the agent in the form of KB article ID and description pair. CCA presents this information to the agent for better handling of the interaction

11 Click OK.

NOTE: You can edit your Web pages to enable or disable collaboration for individual page elements. For example, remove collaboration on a specific text box to prevent an agent from viewing a password entered by a customer.

TIP: See "Process of Using Collaboration and Push Pages".

Process of Using Collaboration and Push Pages

Collaboration allows an agent and a customer to view and interact with the same Web page at the same time during a chat session. For example, an agent can display a Web page so that it appears on the customer's screen, and (using collaboration) watch or help as the customer navigates a Web site, fills out forms, and so forth.

Collaboration essentially means that CCA updates the changes to the agent's Web page in the customer's Web page, and conversely.

This process includes:

1 Setting Internet and Intranet Security on page 325.

2 Enabling the Collaboration Feature on page 327.

3 Generating a Chat Request Form on page 328.

4 Adding Email Interactions to a Project on page 328.

Setting Internet and Intranet Security

The collaboration feature assumes that both agents and customers have their Internet Explorer (IE) security settings at the default levels for both the local intranet (Figure 23) and the Internet (Figure 24):

- The IE default setting for the local intranet is medium-Low.
- The IE default setting for the Internet is medium.

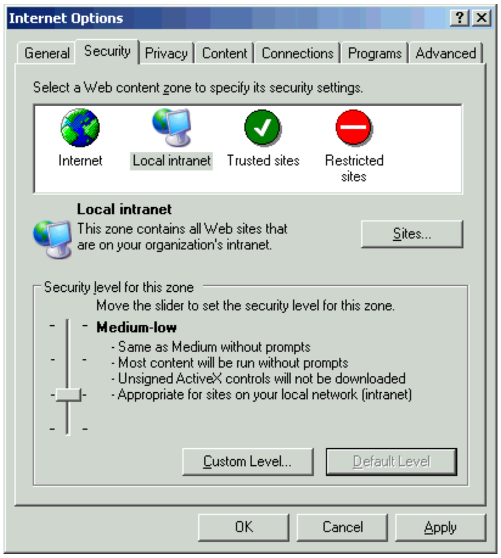


Figure 23. IE Settings for Local Intranet

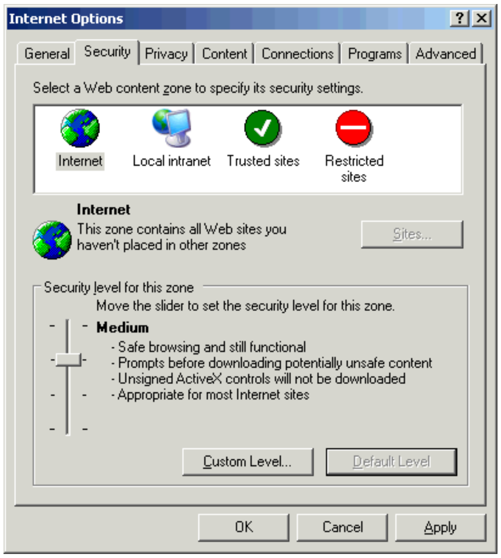


Figure 24. IE Settings for Internet

Enabling the Collaboration Feature

In addition to enabling the collaboration feature in AM, edit the element IDs on your Web pages to support the collaboration feature. Also enable or disable the collaboration feature in the individual elements on the Web page.

To enable the collaboration feature

1. Make sure all elements have a have a unique, alphabetic or alphanumeric ID. Any element (text box, radio button, and so forth) to update during collaboration must have a unique, alphabetic or alphanumeric ID. The following table provides a description of invalid and valid elements.

Element ID	Description
ID=”123”	Not a valid ID, because it does not contain any alphabetic characters.
ID=”A” ID=”A123” ID=“1ABC” ID=“ABC1” ID=“A1BC”	All are valid IDs.

2. Disable collaboration on a specific element by typing a negative number anywhere in the ID string.

   For example, if you disable a text box element, the customer can enter data in that field, but the data will not appear on the agent’s screen (and conversely).

   Disabling collaboration on an element is useful if it contains sensitive information, such as a password or social security number. The following table shows the differences between element types.

Element ID	Description
ID=”-AB” ID=”AB-” ID=”A-B”	In these examples, CCA updates the field (collaboration enabled) because the IDs do not contain a negative number.
ID=”-1AB” ID=”A-123B” ID=“ABC-3”	Disable collaboration (CCA will not update the field) by typing a negative number anywhere in the ID string.

Generating a Chat Request Form

An important component of the chat project is the chat form that customers use to request a chat with an agent. The Chat Request Form appears in the customer's browser when the customer clicks the chat button or chat link on your company's Web site. Use AM to generate the code that produces the Chat Request Form.

NOTE: When creating a Chat Request Form, the URL to access the AM login page must include a fully qualified host name (such as http://myserver.mydomain.com/). If you accessed AM through a URL alias or through an abbreviated host name (such as //myserver/), your customers will be unable to access your form.

To generate a chat request form

1. Open the chat project created in "Process of Adding Chat Interactions to a Project" on page 322.
2. Click Create Page. AM displays a sample chat request form template.
3. Click File and then Save As to save the file to your local drive.
4. Edit and save the .HTML file created so that the customer Chat Request Form meets the company's specifications.
5. Copy the .HTML file to the Web server that provides the contact center services for your company.

   NOTE: You must store the file in the root folder of the Web server, or in a subdirectory of the root folder.

6. Create a link on your company's Web page to the .HTML file on the Web server.

   When a customer clicks the link, the Chat Request Form appears in the customer's browser, allowing the customer to request a chat with an agent working on the project.

Adding Email Interactions to a Project

For agents and supervisors to receive email interactions, you must set up at least one project for email.

NOTE: If the agents or supervisors are receiving email spam, limit the spam emails by using filtering rules and third-party software on your POP3 servers.

To add email interactions to a project

1. Click Options, Projects, the Project to set up, and then click Edit. The Edit Project screen appears.
2. Click the Email tab, and then select the Enable Email Project check box. The Email Servers subtab screen appears.

3 Use the information in the following table to complete the fields:

Field	Description
Email address for this Project	Type the email address customers use to email this contact center project. **NOTE:** Do not use an email client to access the project email address. Doing so prevents CCA from accessing the email project account to route customer emails to agents.
Route Email to Workgroup	From the drop-down list, select the workgroup where CCA routes the emails.
Priority	From the drop-down list, select the priority level to assign to the interactions reaching this email project. **NOTE:** CCA routes the interactions with High priority to an agent in a workgroup before routing interactions with a Low priority to the same workgroup and project.
Script FAQ	From the drop-down list, select the script and FAQ URLs to display on the agent's screen upon receiving the email interaction.
Select POP3 All Clear POP3 Icon	Check the servers to handle the incoming email. Click All to select all the POP3 servers. Click Clear to clear all the check boxes. Click the POP3 icon to create a new POP3 sever and add it to the POP3 Library. **TIP:** For more information on how to create POP3 servers, see "Creating a POP3 Server Library" on page 143. CCA employs the servers using a round-robin method. If one server is busy, CCA uses the next selected server, and so on. **NOTE:** If one or more POP3 servers do not appear on the list, make sure you did not specify them for use in another project. POP3 servers cannot be shared among projects.
Select SMTP Group	From the drop-down list, select the SMTP Server Group to handle the outgoing email for this project. CCA employs the servers in the selected group using a round-robin method. If one server is busy, CCA uses the next server, and so on. **TIP:** For more information on how to create an SMTP Server group, see "Creating an SMTP Server Library" on page 149.

4 Click the Options subtab.

5 Use the information in the following table to complete the fields:

Field	Description
Select Automated Email Response	From the drop-down list, select a number for the Automated Email Response to send to the customer. CCA sends the response to the customer only after downloading the email message from the POP Server. Messages received by the POP Server, but not yet downloaded to CCA do not receive an acknowledgment of receipt.
If Agent does not reply to an Email, forward to another Agent after ___	Type the number of hours to wait for an agent to reply to an email interaction before forwarding the interaction to another agent.
Allow Agent to Respond Directly to the Customer___	Select this option to allow CCA to send email correspondence directly between the agent and the customer. This option provides a means for the customer to communicate with the same agent on all subsequent emails. **NOTE:** Selecting this option prevents CCA from setting alarms on late agent response times and also eliminates recording, tracking of client history, and reporting functionality (after the first reply to the customer) for this project.
Show customer email address to Agent	Select this option to allow agents receiving email interactions to see the email address of the customer in IM, see it in the From address in their email client, and to allow CCA to automatically record the email interaction in the History for the email customer’s contact record (if one exists). Clear this option so that CCA will not show the agents the customer’s email address in IM (shows only ACD Email), and so that the agents cannot see it in the From address in the agent email client. (Agents can still reply to the customer, but they will not know the destination address of the reply.) **NOTE:** If you select Allow Agent to Respond Directly to the Customer, then CCA automatically selects this option by default.

6 Click the Select Intelligent Email Templates subtab. Use this subtab to associate Intelligent Email Templates with an email project.

TIP: For more information on how to create these templates, see “Creating an Intelligent Email Template Library” on page 129.

7 Check Intelligent Email routing.

8 Use the information the following table to complete the fields, and click OK:

Field	Description
Route Template response to customer if accuracy is greater than or equal to ____%	Click to automatically send the Automated Email Response associated with the highest-scoring intelligent email template with a score higher than the value you specify in the percentage box. See "Creating an Intelligent Email Template Library" on page 129. For more information on how CCA calculates the scores for each Intelligent Email template, see "Intelligent Template Example (Scoring)" on page 130. If no templates yield an accuracy level higher than the specified value, CCA routes the email to an agent in the specified workgroup with a scored list of suggested responses, based on all of the project's intelligent email templates.
Route Email to agents with suggested responses	Choose to always route the email to an agent in the specified workgroup with a scored, editable list of suggested responses based on all the project's intelligent email templates.
Select Intelligent Email Templates	Select this option to assign an email to the project. Click All to select all the templates. Click Clear to clear all the check boxes. Click the Email icon to create a new template to add to the library. **TIP:** For more information on how to create a new email template, see "Deleting an Intelligent Email Template Library" on page 131.

Adding Web Callback Interactions to a Project

Web callback projects handle Web-based customer requests for a return phone call. They control:

- How to route the call-back request
- Web pages to display to the customer
- Web pages to provide to agents, which are sent to customers

To add Web callback interactions to a project

1 Click Options, Projects, the Project to set up, and then click Edit. The Edit Project screen appears.

2 Click the Web Callback tab, and then select Enable Web Callback Project check box. The Web Callback screen appears.

3 Use the information in the following table to complete the fields, and click OK:

Field	Description
Priority	From the drop-down list, select the priority level to assign to the interactions reaching this Web callback project. CCA routes the interactions with High priority to an agent in a workgroup before routing interactions with a low priority to an agent in the same workgroup and project.
Route Web Callback request to this Workgroup	From the drop-down list, select the workgroup containing the agents that will handle Web callback requests coming into this project.
Allow Agent to Reschedule a Web Callback	Select this option to allow agents to reschedule a callback after ending the call. If unchecked, the agent will not have the option of rescheduling the callback. **NOTE:** If checked, you must re-create and redeploy the Web callback page.
Script	From the drop-down list, select the script to display to agents receiving Web callback requests for this project.
FAQ	From the drop-down list, select the FAQ content to display to agents receiving Web callback requests for this project.
Contact Center is open	From the drop-down list, select Web page to display after CCA successfully delivers the Web callback request to an agent. **TIP:** For more information on how to set business hours for your company, see “Setting Company Business Hours” on page 66.
Contact Center is closed	From the drop-down list, select Web page to display during nonbusiness hours or if no agents are logged in to CCA. **TIP:** For more information on how to set business hours for your company, see “Setting Company Business Hours” on page 66.
Phone Number is Blocked	If a customer’s phone number is blocked and the customer enters that number in the Request a Callback page, and clicks Call Me, the Web page that you select appears in the customer’s browser window. You can add a customer’s phone number to the blocked list using AM, but you can also add numbers to the blocked list using IM and SM. **TIP:** See “Creating a Call Blocking List” on page 359.

Generating a Web Callback Request Form

An important part of a Web callback project is the online form customers use to request a callback from an agent. The Callback Request Form appears in the customer's browser when the customer clicks the *Request a callback* button, or link on the company's Web site. You can use AM to generate the code that produces the Web callback request form.

NOTE: When creating a Web Callback Request Form, the URL to access the AM login page must include a fully qualified host name (such as `http://myserver.mydomain.com/`). If you accessed AM using a URL alias or an abbreviated host name (such as `//myserver/`), your customers will be unable to access the form you create.

To generate a Web callback request form

1. Open the Web Callback project you created on page 331.
2. Click Create Page. A sample customer Callback Request Form appears.
3. Click File and then Save As to save the file to your local drive.
4. Edit and save the .HTML file so that the Callback Request Form meets your company's specifications.
5. Copy the .HTML file to the Web server providing contact center services for the company.

   NOTE: You must store the file in the root folder of the Web server, or in a subdirectory of the root folder.
6. Create a link on the company's Web page to the .HTML file on the Web server.

   When a customer clicks the link, your Callback Request Form appears in the customer's browser, allowing the customer to enter and send the information necessary for an agent to call the customer back.

Selecting Fax Responses for the Project

Select the fax responses to provide to the agents working on a project.

To select fax responses for the project

1. Click Options, Projects, the Project to edit, and then click Edit. The Edit Project screen appears.
2. Click the Fax Responses tab.
   a. Select the Fax Response for this project by clicking the box next to its name.
   b. To assign all faxes to the project, click All.
   c. To remove all faxes from the project, click Clear.
3. Click OK.

Adding Interaction Outcomes to a Project

Tracking the results of contact center interactions helps measure and compare the performance of agents. Enable the Outcomes feature to create reports for analyzing the results of all interactions handled by agents. For more information on the outcomes feature, see "Require outcome" on page 189. Do the following:

1. Set Outcomes as a requirement for agents.

   For more information on setting outcomes as requirements for agents, see "Process to Use Outcomes" on page 131.

2. Create one or more outcomes (Libraries, Outcomes).
3. Add required outcomes to the project.

   For more information on adding outcomes to a project, see "Adding Interaction Outcomes to a Project" on page 334.

To add interaction outcomes to a project

1. Click Options, Projects, the project to edit, and then click Edit. The Edit Project screen appears.
2. Click the Outcomes tab.
   a. To select an outcome for this project, select the check box next to its name.
   b. To assign all outcomes to the project, click All.
   c. To remove all outcomes from the project, click Clear.
3. Click OK.

Overriding Workgroup Prompts for the Project

When CCA routes a phone customer to a workgroup queue, CCA greets the caller and keeps them informed with recorded prompts while they wait to be connected to an agent. Identify the workgroup prompts to play for the caller when setting up the workgroup.

TIP: See "Setting Workgroup Options" on page 206.

For each project, AM lets you override the default prompts for the workgroups. Overriding the default workgroup prompts allows you to control the prompts that customers hear when they reach workgroups through the project.

To override workgroup prompts for the project

1. In AM, click Options, Projects, the Project to edit, and then click Edit. The Edit Projects screen appears.
2. Click the Workgroup Prompts tab.

3 Use the information in the following table to complete the fields and click OK:

Field	Description
Select Workgroup	Click the workgroup in which you want to override the prompts if the caller reaches the workgroup through this project.
Intro	From the drop-down list, select the initial greeting CCA plays the caller when entering the workgroup.
Ring	From the drop-down list, select the prompt that CCA plays when an agent becomes available, and CCA is in the process of connecting the caller to the agent.
Hold	From the drop-down list, select the message that CCA plays for the caller while the caller waits to be connected to an agent. **NOTE:** CCA does not play this prompt until after the prompt selected for Music finishes playing.
Music	From the drop-down lost, select the prompt that CCA plays immediately after the Intro message while the caller waits to be connected to an agent. When the music prompt finishes playing, the hold prompt plays. CCA then cycles the music and hold prompts continuously until an agent becomes available.

4 Repeat steps 2 to 6 to customize the prompts in other projects.

About Contact Templates

Every project uses a Contact Template. Information about templates in general (and particularly Contact Templates) begins with "Process of Creating a Display Templates Library" on page 96. It will be easier to understand this section if you are already familiar with how Contact Templates work.

CCA associates a Contact Template with a project to format the contact information that agents and supervisors use and to support other features (such as auto-assignment).

TIP: See the topic about contacts management in the *Contact Center Anywhere Interaction Manager Guide*, for more information.

- Select the Contact Template for a project from the Name tab: Options, Projects, the Name tab, and then click Select Contact Template for this project.

  NOTE: When uploading a dialer list to a project, you must give AM some information about what the dialer list looks like. Do this by associating (or mapping) the columns in the dialer list with fields in the Contact Template. This mapping allows AM to do some intelligent processing of the dialer list. For example, mapping allows CCA to know that one or more columns in the dialer list contain phone numbers, which are processed differently than other data.

About Select Field List Boxes

Six list boxes appear at the top of the Dialer List tab. The settings in these boxes apply to all of the dialer lists in your project:

- **Select Phone field.** The phone number to call during predictive dialing.

  For example, the dialer list might have one column for the customer's work phone and another column for the home phone. Use this box to tell CCA which number to call during predictive dialing.

- **Select Pattern Matching field.** The drop-down list provides all fields in the system contact template. You can select any field to use for pattern matching.
- **Select Last Name field.** Points to the customer's first and last names and make predictive dialing more efficient.
- **Select First Name field.** Points to the customer's first and last names and make predictive dialing more efficient.

  When an agent is connected to a predictive call, the customer's entire record appears to the agent. It is not efficient to retrieve all customer information before the agent takes the call, because there might be no answer, a busy signal, or so on. However, when the agent does take a call, it might take a few seconds to retrieve the entire customer record.

  To make efficient use of memory and to give the agent some information up front, select First Name and Last Name in these fields. The agent can always see the name of the customer being dialed. When they are connected to the customer, CCA displays the rest of the record.

- **Select Company Name field**

  If the dialer list has a company name field, select it. CCA displays the company name of the contact to the agent when the agent receives a predictive or preview call.

- **Other field.** Does the following:
  - It takes any column of data from the dialer lists and loads it into the Contacts table in the CCA database.
  - During predictive and preview dialing, CCA passes the current value of the Other field as a parameter to IM, where it can be displayed.

How the Dialer Lists Tab and Select Phone Field Works

The Dialer Lists tab works as follows:

1. CCA selects the Contact Template for this project.
2. CCA finds all fields in the template with an Action Type of Phone.

3 CCA puts those fields in the Select Phone field list box.

The other *Select Field* list boxes in the Dialer List tab work the same way: Select First Name takes all the fields from the Contact Template with an Action Type of First Name. Select Last Name takes all the fields from the Contact Template with an Action Type of Last Name, and so on.

CCA works this way for two reasons:

4 The dialer list might have more than one column for phone numbers (such as Work and Home), but CCA must know which column to use for dialing.

5 The same project might have several dialer lists with different formats. You might want CCA to call numbers from column 3 in the first dialer list and numbers from column 4 in the second dialer list.

The mapping feature with the *Select Field* list boxes are two of the ways to control how to set up the dialer lists.

The following topics are examples of how the Select Phone field list box works and how the Other field list box works. You can find additional examples in the "Process of Setting Up Predictive Dialing Schedules" on page 310.

Example 1: Using the *Select Phone* Field List Box

This example shows how the Select Phone field list box works.

To use the Select Phone field list box

1 Click Options, Projects, and then the Name tab.

2 In the Select Contact Template for this Project field, make sure to select System Contact. The project is using the default System Contact Template.

3 Click Options, Projects, Predictive, and then the Dialer List subtab.

4 From the Select Phone field drop-down list, select the phone location.

NOTE: Unless you edited the System Contact Template, three entries appear: Cell, Home, and Work.

5 Open the System Contact Template:

a Click Libraries and then Display Templates. A list of templates appears.

b Double-click System Contact. The Edit Display Templates screen appears.

c Click the Layout tab.

The System Contact Template has three fields for phone numbers: Work, Cell, and Home. These same fields appear when clicking the Select Phone field in the Project, Dialer List tab.

6 Double-click the Work field. The Defined Label dialog box appears.

Notice that the Associate Label with Action list box is set to Phone. This setting tells CCA to give special attention to the data in this field. With an Action Type of Phone, CCA can determine that this field holds a phone number that it can dial.

Example 2: Using the Other Field List Box

This example shows how the Other field list box works.

Use the Other field list box to add any column from the dialer list to the database. During predictive dialing, CCA takes the value of the Other field from the current contact, and passes it to IM through a custom Web page that you create. When the Web page receives the Other value, it displays the value, performs a database search on the value, and so on.Create a custom Web page:

NOTE: Your custom Web page must have code that can extract the parameters that CCA passes to it.

This sample code parses and displays all of the parameters that CCA passes to IM during Predictive dialing:

```
<html>
  <head>
    <meta http-equiv="pragma" content="no-cache">
    <meta http-equiv="Cache-Control" content="no-cache, must-revalidate">

    <title>Preview Params Test Page</title>

  <script language="JavaScript">
     function getArgs()
     {
       var retVal = '';
       var args = new Object();
       var query = location.search.substring(1);
       var pairs = query.split('&');
       for(var i = 0; i< pairs.length; i++)
       {
          str = pairs[i] + '\n';
          retVal += str;
       }
       textAreaArgs.value=retVal;
}
  </script>
  </head>
  <body onload="getArgs()">

    <TEXTAREA wrap="off" id='textAreaArgs' cols="50" rows="30" width="100%"></
TEXTAREA>
  </body>
</html>
```

To use the Other field list box

1. Create a Library URL that points to your custom Web page:

   a. Select Options, URLs, and then click Add.

   b. In the Add URL screen:

      - Type a name and description for the custom Web page.
      - In the URL text box, type the path to the custom Web page.
      - Under Select the type of URL, select the Script check box.
      - Click OK to save the changes.

2. Add your custom Web page to the predictive project:

   a. Select Options, Projects, the Predictive tab, and then click the Options subtab.

   b. In the Script list box, select the URL created in the previous step.

3. Upload your dialer list:

   See "Uploading a Dialer List" on page 306 for complete details.

   a. As an example, upload a dialer list that looks like the following:

	A	B	C	D	E
1	**First Name**	**Last Name**	**Phone**	**Country Code**	**Customer ID**
2	Doug	Flutie	555-1200	1	44212
3	Drew	Brees	555-1201	1	44213
4	LaDanian	Tomlinson	555-1202	1	44214
5					

   In this example, the Customer ID is a unique identifier for tracking customers in some external (non-CCA) database.

4. Set the Other field:

   a. Select Options, Projects, and then the Dialer Lists tab.

   b. In the Other field list box, select Customer ID.

5. Start Predictive Dialing:

   For more information on starting a predictive project, see Process of Starting and Stopping a Predictive Project on page 307. CCA does the following:

   - When a supervisor starts to use the dialer list, CCA calls the first number.
   - If the call connects to an agent, CCA displays the custom Web page to IM, Predictive tab, Scripts pane and passes it the value of the Other field for the current contact as a parameter (along with several other parameters). In this example, CCA passes the values in the Customer ID column of the dialer list.
   - After the Web page parses and extracts the value of the Other field, the Web page can take any other action. For example, the Web page might look up the Customer ID in some non-CCA database, and then display another browser window with more information about that customer.

16 Setting Up Project Schedules

This chapter describes how to set up project schedules for tailoring call-routing strategies to reflect the company's business practices over the course of a week or over a 24-hour day. This chapter includes the following topics:

- Creating Project Schedules
- Example of Project Scheduling

CAUTION: Before creating Project Schedules, projects must already exist. For information on how to set up projects, see "Creating a Project Definition" on page 291.

Creating Project Schedules

Project schedules enable you to tailor call-routing strategies for your contact center.

To create a project schedule

1. Click Options and then Schedules. A list of schedules appears.
2. Click Add. The Add Schedules screen appears.
3. Using the information in Table 54, complete the fields.

Table 54. Add Schedule Fields and Descriptions

Field	Description
Schedule Name	Type a name for the schedule.
Description	Type a description (or purpose) of this schedule.
Select default Project	From the drop-down list, select the Project definition to disable when the Scheduled Project starts. **NOTE:** Only projects that belong to the current partition will appear in the list.
Phone	From the drop-down list, select the country code and phone number to assign to the Scheduled Project (see next field). **NOTE:** This phone number replaces the *dummy* or empty phone number supplied when defining this project. **TIP:** See "Setting Up Shared-Number Phone Projects for Scheduling" on page 300.

Table 54. Add Schedule Fields and Descriptions

Field	Description
Select Scheduled Project	From the drop-down list, select the project to activate during the scheduled times. This project runs, using the phone number from the Phone field until another scheduled project starts, or until you delete the schedule. **NOTE:** Only projects that belong to the current partition will appear in the list.
Select Time Zone	From the drop-down list, choose the time zone to use when starting the scheduled project. CCA begins running the scheduled project at the Start time (see next field) in this time zone.
Start time	From the drop-down list, select the time of day to activate the project. **NOTE:** Time is in 24-hour notation in the time zone selected (where 1:00 P.M. is 13:00). CCA starts the scheduled project at the specified start time on the days checked (see next field).
Monday, Tuesday....	Check the day (or days) to run the scheduled project.

4 Click Apply to save the schedule.

5 Repeat steps 2 though 4 to finish creating schedules, and click OK.

CCA runs the schedule during the specified times until another schedule starts another project or until you delete the schedule.

NOTE: Because a schedule runs continuously until another schedule starts, it is ineffective to create only one schedule definition. You must create a minimum of two schedules to switch between projects.

Example of Project Scheduling

One common use of CCA's scheduling capabilities is the routing of after-hours calls directly to voicemail instead of routing to agents who have gone home for the night. Table 55 describes two schedules managing two different routing strategies for Jay's Unicycle Company.

Table 55. Example Schedules

Schedule Name	Project Name	Schedule	Call Routing Strategy
Business Hours	Sales	M - F, 09:00 a.m. - 05:00 p.m.	Routes callers to the sales workgroup for handling by an available sales agent.
Nights and Weekends	Sales Voicemail	M - Th, 05:01 p.m. - 11:59 p.m. F, 05:01 p.m. - M, 08:59 a.m.	Routes callers directly to a prompt notifying the caller that the office is closed, and then lets the caller leave a voicemail message.

The first schedule (Business Hours) activates the *Sales* project, which routes callers to a workgroup for handling by an agent during business hours (Monday - Friday, 09:00 a.m. - 05:00 p.m.).

The second schedule (Nights and Weekends) activates the Sales Voicemail project, which routes callers directly to the voicemail system during nonbusiness hours (Monday - Thursday, 05:01 p.m. - 08:59 a.m. and Friday, 05:01 p.m. - Monday, 08:59 a.m.).

NOTE: When using two DNIS numbers, after the schedule activates, CCA resets the phone number of the original project to "none." With the phone number as "none," the project will no longer appear in the schedule. You must re-enter the project phone number each time the schedule activates.

Figure 25 shows the schedules screen as it would appear if you were implementing the Nights and Weekends schedule described in Table 55.

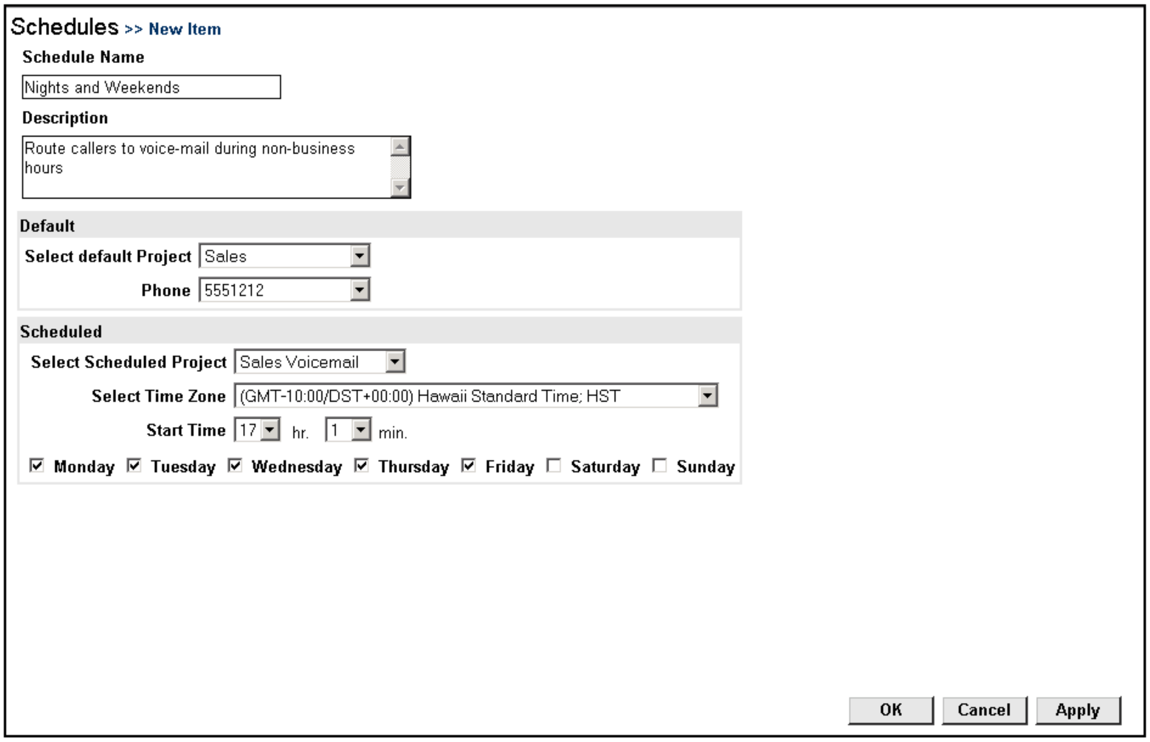


Figure 25. Example: Scheduling a Routing Strategy for Nights and Weekends

In Figure 25, the Nights and Weekends schedule specifies Sales Voicemail as the Scheduled project; meaning that it runs at the specified time on each selected day of the week. The Nights and Weekends schedule continues to run the Sales Voicemail project until another schedule starts and supersedes it.

To stop routing calls to voicemail and resume routing calls to agents, set up a schedule (such as *Business Hours*), which starts the *Sales* project at 09:00 a.m. Monday through Friday (see Figure 26).

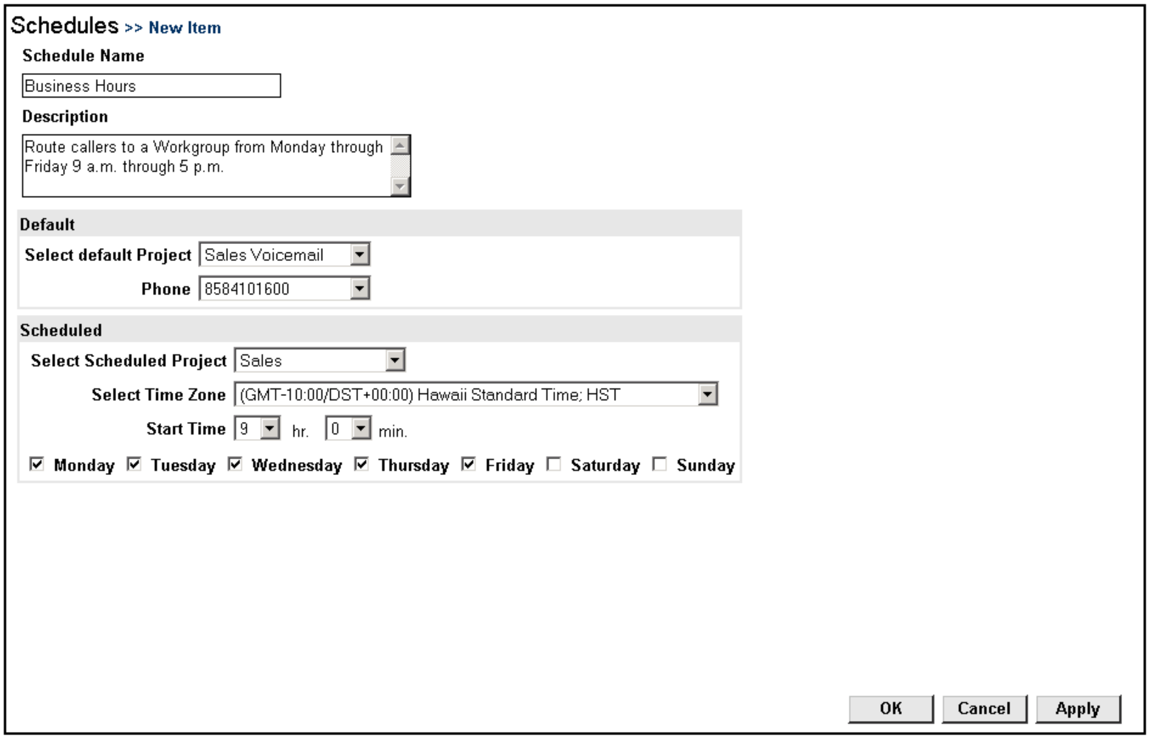


Figure 26. Example: Schedule to Resume Call-Routing Strategy for Business Hours

17 Prioritizing Phone Customers

This chapter describes how to prioritize phone customers so that CCA will handle the most important callers first. This chapter includes the following topics:

Assigning Priority Levels to Customers

As CCA routes callers to workgroup queues and then agents, CCA uses the customer's priority level to determine the customer's position in the queue. CCA places callers with higher priority nearer to the front of the queue than customers with lower priority.

Customer priority affects only the interactions that CCA routes through a workgroup. For example, if your contact center has agents who receive direct inbound calls, customer priority is being circumvented, because CCA has no way of controlling direct inbound calls.

NOTE: If you have two customers with different priority levels and a shared phone number, CCA cannot identify the customer. In this case, CCA sets the priority of both customers to the level assigned to the first record in the database that matches the detected phone number. Whenever possible, use Customer ID information that is unique to each customer. This helps CCA accurately identify and prioritize the caller.

Setting Customer Priority

To assign a priority level to a customer, you must know one of the following:

- The customer's ID information
- The customer's telephone number

To set customer priority

1. Click Options, Customer Priority, and then Add. The Add Customer Priority screen opens.

2 Use the information in the following table to complete the fields with the information CCA uses to identify the customer for prioritization:

Priority Field	Description
Customer Name	Type the customer's name.
Customer ID	Type the customer's ID. Your project must be configured to require customers to provide an ID for prioritization. **TIP:** For information on how to gather ID information from customers, see "Use Prompt to ask for customer ID" on page 296.
Country Code	From the drop-down list, select the country code of the customer's telephone number.
Phone	In the box, type the customer's telephone number.
Standard, Bronze, Silver, Gold, Platinum	Select this option to choose the priority for this customer. CCA routes callers to agents based on this priority. **NOTE:** If a customer does not have a priority, CCA assigns the customer the default standard priority.

3 Click Apply.

4 Repeat Step 2 and Step 3 to assign a priority level to all customers, and click OK.

Enabling Customer Priority for a Project

After creating Customer Priorities, edit each project that uses those priorities:

- Click Options, Projects, the Phone tab, the Options subtab, and then select the Enable Customer Priority Rating check box.

TIP: For more information, see "Enable Customer Priority Rating" on page 298.

Identifying Customers for Prioritization

To prioritize a phone customer, CCA must be able to match the caller's Customer ID or phone number. Table 56 provides identifiers and explains how CCA uses them.

Table 56. Identifying Customers for Prioritization

Identifier	Method of Obtaining Identifier
Customer ID	You must configure CCA to ask a customer to identify themselves by entering the ID number. **TIP:** For information on how to configure CCA to ask for an ID number from telephone customers, see "Use Prompt to ask for customer ID" on page 296.
Phone Number	If no Customer ID number is available, CCA tries to identify the customer using the phone number. ■ CCA can automatically detect the caller's phone number as long as the caller did not block it. ■ If CCA cannot detect the caller's phone number, you must ask the customer to enter the phone number. **TIP:** For information on how to configure CCA to ask a customer to enter the phone number, see "Validate phone number" on page 295.

TIP: For information on how to configure a phone project to gather the information necessary to identify customers for prioritization, see "Process of Adding Phone Interactions to a Project" on page 294.

NOTE: Customer priority levels take precedence over project priority levels. If Customer prioritization is enabled (meaning you checked the Use Prompt to ask for customer ID box, see "Use Prompt to ask for customer ID" on page 296), CCA always prioritizes the interaction, based on a customer priority level, disregarding a project priority level (see "Priority" on page 295).

18 Managing Mail Interactions

This chapter describes how to troubleshoot your contact center's email system by listing details for failed email messages and by correcting and resending the messages. This chapter includes the following topics:

About Mail Interactions

A *mail interaction* can be an email or a voicemail. CCA works with mail interactions by factoring the following:

- The number of email and voicemail interactions an agent is configured to receive
- Whether the email or voicemail interaction is in the active interaction window in Interaction Manager (IM)

Normally, the Email Distributor sends mail interactions to a specific project, which then routes them to a workgroup. However, unlike a voice call or a chat, an email interaction does not take up an interaction license until the agent accepts the email and moves it to the active interaction window.

If you configure the agent to handle multiple interactions at one time, then the agent could receive three or more interactions. If, for example, the agent accepts all three interactions, then three interaction licenses are tied up until the agent either disconnects or sends the emails back. (This is not an ideal practice.)

Because the Email Distributor sends an email to the agent's inbox with an interaction ID, it is best to configure the agent to accept only one interaction:

When the interaction is delivered to the agent, if the agent accepts the interaction and responds to it immediately, then the license is released.

If the agent needs time to respond to the email, then the agent can disconnect it (to release the license). When the Discard Email message appears, the agent elects to keep the email and not discard it by selecting No. The agent can then continue to respond to the email interaction. When the agent finishes, the email client forwards the email response back through the Email Distributor, which closes interaction tracking.

If the agent fails to respond in time, CCA will automatically send the email interaction to another agent. (The response time is a configuration setting.)

If CCA forwards the email to another agent, and the other agent responds prior to the original agent, then the Email Distributor will intercept the second message and delete it.

Troubleshooting Emails

Use AM to troubleshoot your contact center's email system by listing the details of failed email messages and by correcting and resending the messages. For example, if an agent attempts to send an email to a customer, but enters an invalid email address, use the Mail Manager screen to identify the problem, correct the error, and resend the email.

NOTE: In addition to standard email messages, Mail Manager reports any failed communications that move through the contact center using the email system (voicemails, faxes, and so on).

Viewing Mail Interactions

Use AM to view the following types of mail interactions:

- All emails and voicemails
- Emails and voicemails with errors
- Corrected emails and voicemails now pending (waiting to be sent)
- Corrected and sent emails and voicemails

To view email interactions

1. Click Options and then Mail Manager. A list of mail interactions appears.
2. The default is to view All mail interactions.

   NOTE: CCA's retrieval limit is a maximum of 500 mail interactions.

   You can select one of the filter methods from the drop-down list to view only the selected email messages:

   a. From the Show drop-down list, select one of the following:
      - **Mail Pending.** Shows corrected mail interactions that are waiting to be sent by an SMTP Server.
      - **Mail with Errors.** Shows mail interactions that never reached the destination.
      - **Mail already sent.** Shows corrected mail interactions that were sent to customers.

   b. To search for mail interactions:
      - Click a letter or number at the top of the screen.
      - Click the Remove Filter button to go back to the list of all mail interactions.
      - Enter a string in the Find box.

- Click Go.

When using the Find text box (or when clicking a letter or number at the top of the screen), AM searches the currently selected column. For example, if you click the Recipient column, and then click the letter *A*, CCA shows only mail interactions where the recipient address begins with the letter *A*.

The same is true when typing a string in the Find text box. If you click the Originator column, and then enter *Steve* in the Find text box, CCA shows only the mail interactions where the originator address begins with the string *steve*.

NOTE: The Find text box is not case sensitive.

The Find text box also supports the percent sign (%) as a wildcard. For example, to find all mail interactions from a single domain, enter:

```
%@yahoo.com
```

Use the wildcard character anywhere in your search string

Use the information in the following table to interpret the report:

Column	Description
Interaction ID	The system-assigned identification number for the interaction.
Recipient	The mail address of the intended mail message recipient.
Originator	The mail address of the sender of the mail.
Date	The date that the mail was sent.
SMTP Group	The SMTP Group used (or to be used) to send the mail.

3. To sort the list based on the contents of a column, click the column header.
4. Click Refresh to update the list with current information.
5. Click the mail interaction to view, and then click View/Edit. The Edit Mail screen appears.
6. Use the information in the following table to understand the attributes of the mail, and click OK:

Attribute	Description
Originator	The mail address of the person who sent the mail.
Recipient	The mail address of the intended recipient.
Group Name	The SMTP Group used (or to be used) to send the mail.
Interaction ID	The system-assigned identification number for the interaction.
Subject	The subject line of the mail message.
File	Name of the text file into which the mail was converted for handling by CCA.
File Path	Location in which the mail file is stored for processing.
Error Message	Describes the error.

Correcting Emails and Resending

If an email did not reach its intended recipient (due to agent error, server problems, or any other reason), you can correct the problem and re-send the message.

NOTE: If an email error occurred because the agent's email address was incorrect, you must correct the agent's email address first, then follow the steps to correct the email messages.

To correct emails and resend them

1. Display all emails with errors.

   TIP: See "Viewing Mail Interactions" on page 354.

2. Click the email that you want to correct.
3. Click View/Edit. The Edit Email screen appears.
4. Correct any errors in the email Recipient or Group Name attributes, and click OK.

   CCA moves the email into the Mail Pending group and queues the message for re-sending.

Process of Deleting Mail Interactions

You can delete failed mail interactions from the Mail with Errors group and from the Mail Already Sent group. You can:

- Deleting a Single Mail Interaction
- Deleting All Mail Interactions

Deleting a Single Mail Interaction

To delete a single mail interactions

1. Choose the email group containing the mail interactions that you want to delete.
2. Click the mail that you want to delete.
3. Click Delete.

   A confirmation message appears.

4. Click OK.

Deleting All Mail Interactions

To delete all mail interactions

1. Choose the email group containing the mail interactions that you want to delete.
2. Click the mail that you want to delete, and then click Delete All.

   A confirmation message appears.
3. Click OK.

19 Call Blocking

This chapter describes how to use call blocking to prevent agents and the CCA automated callback features from calling specific phone numbers. This chapter includes the following topics:

- About Call Blocking
- Creating a Call Blocking List

About Call Blocking

You can block numbers for any outbound phone interaction, including:

- Outbound calls placed by agents
- Calls to an agent's follow-me (forwarding) number
- Calls transferred by an agent
- Web callbacks
- ACD callbacks
- Predictive calls
- Preview calls

When an agent tries to call a blocked number, IM displays an error message indicating that the number is blocked. If a customer requests a callback (through either your Web site or your workgroup callback menu) to a blocked country code or number, CCA plays a prompt for the customer indicating that the request cannot be processed.

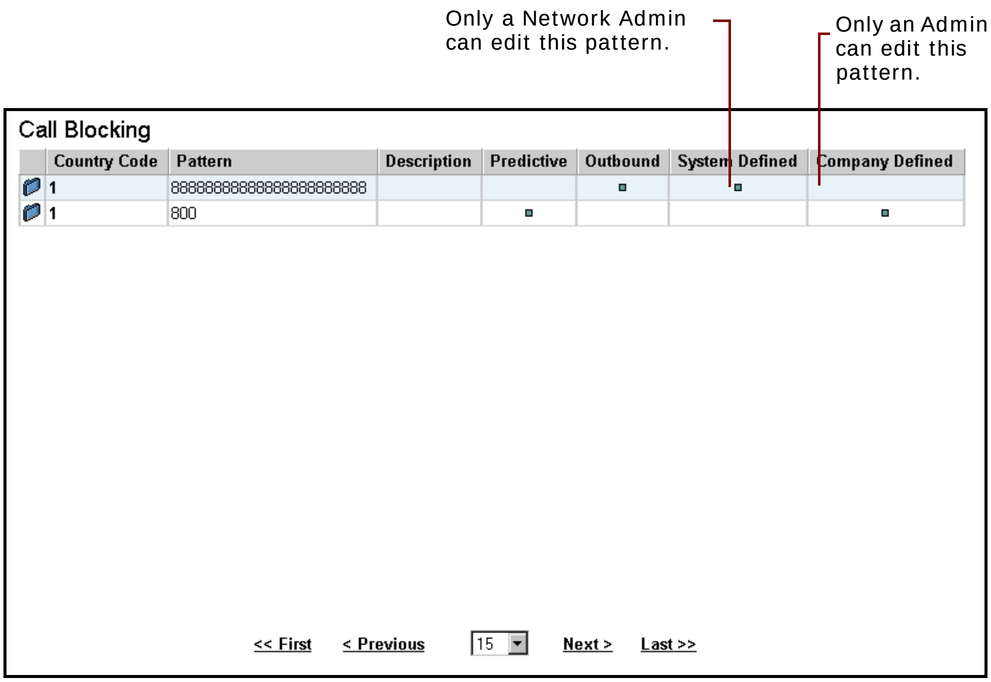
NOTE: Call blocking lists created by a network administrator can be deleted only by a network administrator.

Creating a Call Blocking List

Use a call blocking list to identify the numbers to block so that campaigns and agents cannot use them when making outbound phone interactions.

To create a call blocking list

1. Click Options and then Call Blocking. CCA displays the list of previously defined Call Blocking Patterns if any exist.



- System Defined column. If a bullet appears, then a network administrator added or modified the pattern.

  NOTE: Only a network administrator can edit this pattern.

- Company Defined column. If a bullet appears, then a system administrator or an Administrator added the pattern.

  NOTE: Therefore, an administrator can edit this pattern.

2. Click Add. The Add Call Blocking screen appears.
3. Use the information in the following table to complete the fields, and click Apply:

Field	Description
Country	From the drop-down list, select a country code to block. CCA blocks all call attempts to the numbers specified in the Phone text box (next field) in this country code.
Pattern	Type a phone number or pattern to block. For example, to block all calls to the number 858-410-1600, simply type the number, as shown. **NOTE:** This blocks only calls placed to this specific number.

Field	Description
	Use the asterisk (*) wildcard character to block all digits in zero or more positions of the number. For example, enter 9* to block all numbers with an area code beginning with 9, including 900-123-4567, 988-765-4321, 999-123-4567, and so on. This pattern does not block, for example, calls to 888-854-4224 or any other number that does not have an area code beginning with 9.
	Use the question mark (?) wildcard to block all digits in a single position of the number. For example, enter 90?-123-4567 to block the phone number 123-4567 in all area codes beginning with 90 (including 901, 902, 903, up to 909). This pattern does not block, for example, the number 910-123-4567 or any other number that does not have an area code beginning with 90.
Description	Type a description for this call blocking list. This information appears in the Description column of the Call Blocking list.
Outbound Call	Select this option to prevent agents (or the CCA automated callback system) from placing calls to numbers matching the specified pattern. Clear this check box to allow outbound calls to numbers matching the pattern. (This feature also applies to preview calls.)
Predictive Call	Select this option to prevent CCA from placing predictive calls to numbers matching the specified pattern. Clear this check box to allow predictive calls to numbers matching the pattern.

4 Repeat Step 2 through Step 4 for all the patterns that you want to block and click OK.

A Customizing Application Interfaces

This appendix describes how to customize almost any text appearing on the Interaction Manager (IM), Supervision Manager (SM), or Administration Manager (AM) screens, provided your system is configured to allow you to do so. This appendix includes the following topics:

- About Interface Object Keys and Resource Bundles
- Process of Customizing Interface Text

About Interface Object Keys and Resource Bundles

While you cannot change the function of the controls and fields in CCA (with the exception of the customizable IM screen) you can replace the titles, messages, and labels on the CCA user interfaces, so that they make the most sense to your agents, supervisors, and administrators.

TIP: For more information about customizing IM, see Appendix B, "Extending the Interaction Manager"

CAUTION: Changes to the CCA workstation interfaces are system-wide, which means, your changes affect all companies in the system.

Interface object keys contain the text that CCA displays to users in IM, SM, and AM:

- Menu names
- Menu items
- Labels for check boxes, radio buttons, list boxes, and so on

A *Resource Bundle* is a file where CCA stores groups of related Interface Object Keys. For example, CCA stores most of the configurable text for Interaction Manager screens in a resource bundle called *Interaction Manager.*

Process of Customizing Interface Text

There are three general steps to customizing interface text:

1. Finding and Changing Text on page 364. Find the text that to change in the resource bundle file where CCA stores the text.
2. Customizing Text in Administration Manager on page 364.
3. Generating New Resource Bundle Files on page 365.

CAUTION: Any text change that you make applies to every company.

Finding and Changing Text

In the Chat screen of IM there is a Collaborate button. To change the name of this button to *View Customer's Browser*, first find out which resource bundle file contains the text *Collaborate*.

To find and change text

1. Log in to AM with the netadmin account, and view the list of companies.

   TIP: See "Starting and Logging In" on page 11.

2. Click the Go To menu, and choose Resource Bundle. The Resource Bundle dialog box opens.
3. To modify a button name in IM, click the Resource Bundle list box, scroll down the list, and choose Interaction Manager.

   NOTE: This is the resource file where CCA stores general text for IM.

   Most of the resource files have obvious names. For example, a resource bundle called *Agent Status* contains agent status. However, not all of the customizable text for an application is in the same resource bundle. CCA might distribute customizable text for IM in approximately 10 different files.

4. At the top right of the Resource Bundle dialog box, click Value.
5. In the text box under the Key and Value buttons, type the word *Collaborate*, then click Go (or press Return).

   The search field also does a default substring search, so:

   - *Col* matches *Collaborate* and *Color* in Graph.
   - You can also use the percent sign (%) as a wildcard, so %uba matches *Cuba* and *Aruba*.

   In this example, the search for *Collaborate* had two results. The first string is the name of the button. The second string is the mouse over text for the button.

6. Double-click the first row of the search results (`acdChat.collaborate`). The Key page appears.
7. Click the Value column, and enter the new text for the button.

   NOTE: You can enter new text for any of the languages that CCA supports.

8. When you finish entering the new text for the button, click OK.
9. Use these additional steps to make any other text changes:
   - Use the Resource Bundle list box in the Database tab to select the resource bundle file containing your text. You might have to search in a few different files to find the text to change, but most of the resource bundle files have fairly obvious names.
   - Change the text in the Key page, and save your changes.

Customizing Text in Administration Manager

There is a shortcut for finding customizable text, but it is supported only in AM.

To customize text

1. Find the text to change. For example, in the AM Navbar, change the hyperlink `Skills` to `Talent`:
2. Click and hold the left mouse button on the word Skills and, while holding the mouse button down, press the Control + shift + R keys. The Resource Bundle dialog box opens. Notice that the resource bundle file containing the text Skills is already selected by default.

   NOTE: This shortcut makes it easy to find which of the AM resource bundle files contains the text to edit.
3. Follow the steps in "Finding and Changing Text" on page 364 to find the Skills key/value row, and make your text changes.

Generating New Resource Bundle Files

After making all text file changes, generate new resource bundle files containing the changes.

To generate new resource bundle files

1. Open the Resource Bundle dialog box, and select the Files tab.
2. In the Resource Bundle list box, select the resource bundle file that you modified.

   NOTE: If you modify text in several different resource bundle files, you can select All in the Resource Bundle list box. However, depending on your network speed, Web server configuration, database resources, and so on, it could take a long time to generate all of the resource bundle files. In general it is faster to regenerate only the files you modified.
3. In the Language list box, select the language in which you created the new text (or select All).
4. Click Generate. CCA generates new resource bundle files containing your changes.

The next time users log in, they will see your changes.

B Extending Interaction Manager

You can customize Interaction Manager (IM) so that it integrates with other applications, such as a CRM or Help Desk. This appendix describes how to perform the following tasks:

- Adding a Button and a Screen to Interaction Manager
- About Interaction Parameters
- Launching an External Application
- Running an Executable From Interaction Manager
- Enabling Predictive Call Handling
- About Capturing Contact Information from Predictive and Preview Interactions

Adding a Button and a Screen to Interaction Manager

Add a control button to the IM interface to give agents access to a custom screen. Then, access and display interaction information to agents in that custom screen.

In IM, you can:

- Display an additional control button with a unique label
- Display an HTML file
- Access and use eight parameters describing the interaction properties

To add a button and a screen to Interaction Manager

1. Click Company Profile, and then Add. The Add Company screen appears.
2. Click CRM Integration. The CRM tab appears.
3. Click the Enable custom tab in Interaction Manager.
4. In the Enter Text Label text box, type the text for the button.
5. In the Include HTML File text box, type the name of the HTML or JSP file to display when the agent clicks the custom button, and click OK.

   When the agent clicks the custom button, IM displays the HTML or JSP file specified. When IM receives a new interaction, it passes the parameters describing the interaction to your custom code.

TIP: For information about the parameters code you can access and use to interact with your custom code, see "About Interaction Parameters."

About Interaction Parameters

Each time CCA receives a new interaction, IM passes seven parameters containing information about the incoming interaction to the HTML or JSP file:

- If you use Java Server Pages for script content, access the values for these parameters using standard methods.
- If you use HTML for script content, you must create your own methods to access the values for the parameters.

Parameter	Description
intid	Interaction ID
projectId	Project ID
From	Interaction ANI information
To	Interaction DNIS information
urlscriptId	Script ID
urlfaqId	FAQ ID
type	Interaction Type. Can be the following: 2001 = New inbound call 2002 = New outbound call 2003 = New predictive call 2004 = End call 2005 = New inbound extension 2006 = New outbound extension 2007 = New ACD call 2008 = New ACD Web callback 2009 = New ACD callback 2010 = New ACD Web phone 2011 = New ACD chat 2012 = New ACD email 2013 = New ACD voicemail 2014 = New ACD fax

Launching an External Application

Configure IM workstations so that they launch an external application when the following actions occur:

- IM receives a new interaction
- IM accepts an interaction
- An interaction in IM becomes the active interaction when sent to an agent

Running an Executable From Interaction Manager

To further customize your version of CCA, you may want to run an executable application not provided with CCA.

To run an executable application from Interaction Manager

1. Click Company and then Add. The Add Company screen appears.
2. Click CRM Integration. The CRM Integration tab appears.
3. To invoke an application within the custom tab in IM:
    a. Click the Enable custom tab in IM.
    b. In the Enter Text Label text box, type a name for the application.
    c. In the Include HTML File text box, type the URL of the file to load in the custom tab.
    d. Indicate when IM is to launch the application by choosing one of the following:
        - *Every time a new Interaction is received:* Launches the application every time IM receives a new interaction.
        - *When a new Interaction is accepted:* Launches the application the first time that the agent accepts the new interaction.
        - *Each time Interaction is accepted:* Launches the application every time that the agent makes the interaction the active interaction.
        - *After each Interaction is complete:* Launches the application every time that the agent completes an interaction
4. To invoke an external application without using the custom tab in IM:
    a. Click the External Application tab.
    b. Select Enable external application to invoke from Interaction Manager.
    c. In the Application to invoke text box, type the full path to the location of the executable.
    d. From the Application Type drop-down list, select the window behavior:
        - HTML Modal: Opens a new Web browser window with the URL from the Application to Invoke text box. (Use this option when you do not want the user to return to another application until this window is closed.)
        - HTML Window: Opens a new Web browser window with the URL from the Application to Invoke text box. (Use this option when you want the user to minimize, or close the window without selecting an option in the new window. The behavior is similar to the standard Windows behavior.)
        - Win32 Window: Launches a Windows32 executable.
        - Check Enable external application to invoke from Interaction Manager.

    NOTE: You must install the application to launch it on all IM workstations.

5 Identify when IM is to launch the application by choosing:

- Every time a new Interaction is received: Launches the application every time that IM receives a new interaction
- When a new Interaction is accepted: Launches the application the first time that the agent accepts the new interaction
- Every time Interaction is accepted: Launches the application every time that the agent makes the interaction the Active interaction
- After each Interaction is complete: Launches the application every time that the agent completes an interaction

6 When IM launches your application, CCA passes an array containing the following strings to the application:

- Interaction ANI information
- Interaction DNIS information
- Project ID
- Script ID
- QA ID
- Interaction ID
- Interaction Type

Enabling Predictive Call Handling

For agents to log in to predictive projects and to handle predictive interactions, you must enable Predictive Call Handling to display the necessary IM screen controls.

NOTE: CCA does not begin placing predictive calls until you start a predictive project.

TIP: See "Process of Starting and Stopping a Predictive Project" on page 307.

NOTE: Enabling Predictive Call Handling adds the Predictive button and login screen to the agent's IM console, so that agents can handle predictive interactions.

To enable predictive call handling

1 Click Company and then Add. The Add Company screen appears.

2 Click the Company Configuration tab. The Company Configuration tab appears.

3 Check Enable Predictive and then click OK.

CCA dynamically updates IM so that it displays the predictive button. Agents do not need to log out and log back into IM to see the button.

About Capturing Contact Information from Predictive and Preview Interactions

IM Predictive and Preview screens contain a script frame to display HTML or JSP content for the agent to use when handling a contact. You specify the URL containing the script content in the Predictive and Preview tabs of the projects screen.

TIP: See "Adding Predictive Calling to a Project" on page 300 and "Process of Adding Chat Interactions to a Project" on page 322.

When the agent is handling a predictive or preview interaction, IM passes the following parameters (Table 57) describing the contact to the code that you supply to populate the script frame:

Table 57. Predictive and Preview Contact Parameters

Parameter	Contains
title	The contact's title.
firstname	The contact's first name
lastname	The contact's last name
companyname	The contact's company name
contactid	The contact's CCA identifier
dnis	The contact's telephone number
countrycode	The contact's telephone country code

- If you use Java Server Pages for script content, access the values for these parameters using standard methods.
- If you use HTML for script content, you must create your own methods to access the values for the parameters.

C Integrating the HEAT Call Logging Program

This appendix describes how to use the built-in support for the HEAT® Call Logging program to configure Administration Manager (AM) so that Supervisor Manager (SM) or Interaction Manager (IM) automatically passes the automatic number identification (ANI) for the customer to the HEAT Call Logging application. This appendix contains the following topics:

- Configuring Administration Manager
- Enabling Administration Manager Support for the HEAT®Call Logging Program
- Configuring HEAT Administrator
- About Passing the Customer ANI to the Call Logging Program

Configuring Administration Manager

A simple configuration process exists for both AM and the HEAT Administrator program. You decide when to pass the customer ANI to the Call Logging program:

- Every time a new interaction is received
- When a new interaction is accepted
- When an interaction is made active
- When an interaction is completed

Enabling Administration Manager Support for the HEAT®Call Logging Program

To enable you the HEAT Call Logging program, you must also configure the HEAT Administrator. See Configuring HEAT Administrator on page 374.

To enable AM support for the HEAT Call Logging program

1. Start AM.

   NOTE: If you have permission, select the company that will be using HEAT Call Logging.

2. Select Options, Company, and then the CRM Integration tab.
3. Click the External Application subtab. The External Application tab appears.
4. Select the Enable external application to invoke from the Enable external application to invoke from Interaction Manager check box.

5 Use the information in the following table to complete the fields, and click OK:

Field	Description
Application to Invoke	If you are using the HEAT Call Logging program, your CCA installation includes a special executable called HeatIntegration.exe. CCA uses this executable to pass customer ANI information to the Call Logging program. Every user (agent and supervisor) must have access to this program. Although you can install HeatIntegration.exe on every user's machine, it is usually more efficient to install the program on a network server, and then map a network drive to that server on each user's machine. In the Application to Invoke text box, type the full path to the HeatIntegration.exe file (for example: `y:\HeatIntegration.exe`)
Application Type	You must select Win32 Window.
Run Application	Select when to pass the customer ANI to the Call Logging program. For example, choose *After Each Interaction is Complete* so that the customer ANI will not be passed to the Call Logging program until the current interaction ends.

Configuring HEAT Administrator

To enable support for CCA in the HEAT Administrator program, you must first configure it.

To configure HEAT administrator

1 Start the HEAT Administrator program.

2 In the HEAT Service and Support Data Source dialog box, select a data source and click OK.

3 In the HEAT Administrator login page, type your user ID and password, and click OK.

4 When the HEAT Administrator module opens, select Defaults menu, DDE/Telephony, and then Telephony Setup.

5 In the Telephony Settings dialog box, select the Enable Telephony tab:

   a Select the Enable Telephony Integration check box.

   b In the Telephony Application Name text box, type `HeatIntegration`, and lick OK.

6 Select the DDE Service and Topic tab.

7 Use the information in the following table to complete the fields on the screen, and click OK:

In this field . . .	Enter this value . . .
DDE Service	HEATService
DDETopic	HEATTopic
Outgoing DDE Service	HeatIntegration
Outgoing DDE Topic	TAWHEATIntegration

8 In the HEAT Administrator module, select Defaults menu, DDE/Telephony, and then Customer Search.

9 In the DDE/Telephony Customer Search Defaults dialog box, select the fields to use when searching for the customer's ANI, and click Add.

10 Click OK to save the changes.

The configuration for CCA Call Logging support is complete.

About Passing the Customer ANI to the Call Logging Program

To ensure that CCA passes the customer ANI to the HEAT Call Logging program, do the following:

- The user (agent or supervisor) must have the CCA application (SM or IM) and the Call Logging program running on the machine.
- If a user was running the Call Logging program while you were performing this configuration, ask the user to close the Call Logging program, and then to restart it.

D Parameters Passed to External Applications

This appendix provides a list of the parameters required to configure Oracle's Administration Manager (AM) so that an existing Web page (or Win32 application) will launch from Interaction Manager (IM). It includes the following topics:

Parameters Passed to Win32 Applications

You can configure AM so that an existing Web page (or Win32 application) launches from IM. For more information on how to configure AM, see "Integrating CRM With the Internet or a Win32 Application" on page 68.

When the Web page (or Win32 application) launches on the agent's machine, CCA passes it a set of parameters containing information about the current interaction:

- For a Web page, CCA passes the parameters in the URL string.
- For a Win32 application, CCA passes the parameters as command line arguments.

The Web page (or Win32 application) can contain code to parse the parameters so that you can use information for your own purposes.

Table 58 provides a list of parameters that CCA passes to Win32 applications.

Table 58. Parameters Passed to Win32 Applications

Parameter	Description
-a	This parameter contains the ID of the agent making the call (for these calls only): ■ Inbound calls ■ Outbound calls to company extension ■ Direct outbound calls to external numbers ■ Predictive and Preview calls This parameter contains the customer's phone number (for these calls only): ■ ACD ■ Direct Inbound
-d	This parameter contains the ID of the agent making the call (for these calls only): ■ Inbound calls ■ Outbound calls to company extensions This parameter contains the number that the agent called (for these calls only): ■ Direct outbound calls to external numbers ■ Predictive and Preview calls This parameter contains the project phone number (for these calls only): ACD calls. This parameter contains the number that the customer called (for these calls only): Direct Inbound.
-p	The ProjectId. The application finds the project name from the Projects Table. **TIP:** See the *Contact Center Anywhere Database Tables Manual*.
-s	The ScriptId. The application finds the script name from the LibraryURL Table. **TIP:** See the *Contact Center Anywhere Database Tables Manual*.
-q	The FAQId. The application finds the FAQ name from the LibraryURL Table. **TIP:** See the *Contact Center Anywhere Database Tables Manual*.
-i	The interaction ID.
-t	An integer representing the interaction type ID. For more information on the interaction types, see Table 60.
-b	The session ID on the Web server.
-u	The agent's user ID. The application finds the script name in the Users Table. **TIP:** See the *Contact Center Anywhere Database Tables Manual*.

Table 59 provides descriptions of the interaction states.

Table 59. Interaction States

Interaction State ID	Description
2209	INTERACTION_INCOMING An inbound interaction.
2210	INTERACTION_HOLD An interaction on hold.
2211	INTERACTION_VOICEMAIL A voicemail interaction.
2212	INTERACTION_ACTIVE An interaction sent to an agent.
2213	INTERACTION_CREATE_CONFERENCE An interaction in conference.
2214	INTERACTION_CHAT A chat interaction.

Table 60 provides descriptions of the interaction types.

Table 60. Interaction Types

Interaction Type ID	Description
2001	NEW_INBOUND_CALL
2002	NEW_OUTBOUND_CALL
2003	NEW_PREDICTIVE_CALL
2005	NEW_INBOUND_EXTENSION
2006	NEW_OUTBOUND_EXTENSION
2007	NEW_ACD_CALL
2008	NEW_ACD_WEB_CALLBACK
2009	NEW_ACD_CALLBACK
2011	NEW_ACD_CHAT
2012	NEW_ACD_EMAIL
2013	NEW_ACD_VOICEMAIL
2014	NEW_ACD_FAX

Table 60. Interaction Types

Interaction Type ID	Description
2024	NEW_OUTBOUND_EMAIL
2033	NOTE
3007	NEW_PREVIEW_CALL
3340	NEW_DIRECT_CHAT
3341	DIRECT_CHAT_SEND_MESSAGE

Parameters Passed to Web Pages

Table 61 provides a list of parameters that CCA passes to the Web pages and Table 62 on page 381 provides a list of parameters that CCA passes for chat and Web callback.

Table 61. Parameters Passed to Web Pages

Parameter	Description
interactionId	A unique ID for each installation. (You never repeat this number, no matter how many companies users might be servicing.) The number could, however, be repeated at a separate CCA installation.
projectId	A unique ID for each project.
to	The number the customer dialed.
from	The customer's ANI.
scriptId	The ID of the script that the project uses.
faqId	The ID of the FAQ that the project uses.
interactionType	The interaction type ID. **TIP:** See Table 60 for a list of interaction types.
state	The State ID of the interaction. **TIP:** See Table 59 for a list of states.
display	A string describing the interaction. The description appears in active interaction area.
agentFirstName	The agent's first name.
agentLastName	The agent's last name.
agentCompanyName	The company with which the agent is associated.
companyId	The customer's company.
agentId	A unique agent ID number.

Table 61. Parameters Passed to Web Pages

Parameter	Description
imFirstName	The contact's first name. CCA always passes this parameter, but does not add a value to this parameter unless a contact is assigned.
imLastName	The contact's last name. CCA always passes this parameter, but does not add a value to this parameter unless a contact is assigned.
imCompanyName	The contact's company name. CCA always passes this parameter, but does not add a value to this parameter unless a contact is assigned.
imContactId	The contact's ID. CCA always passes this parameter, but does not add a value to this parameter unless a contact is assigned.

Web Parameters Passed for Chat and Web Callback

These parameters (Table 62) are passed to all Web pages, but they might be empty unless the interaction is a chat callback or a Web callback.

Table 62. Parameters Passed for Chat and Web Callbacks

Parameter	Description
requestTime	Time when the customer wants a callback. (An integer of the number of seconds Greenwich Mean Time (GMT) since 1970.)
contactId	In a chat or Web callback interaction, the contact ID is obtained from the preview or predictive contact's ID.
offset	The time zone. Sent as an offset from GMT in seconds.
queueTime	The time that the customer has been in the queue.
countryCode	The country code that the customer selected in the Web Callback screen.
timezone	The time zone of the person who requested the Web callback.
rescheduleTime	A callback has been rescheduled at this time.
email	The email address the customer entered in the Request a Chat page.
priority	The priority of the current interaction, taken from the project.
title	No longer used.
extension	The extension the customer entered in the Web Callback page or Chat Request page.
firstName	The first name the customer entered in the Web Callback page or the Chat Request page.
lastName	The last name the customer entered in the Web Callback page or the Chat Request page.

Table 62. Parameters Passed for Chat and Web Callbacks

Parameter	Description
companyName	The company name that the customer entered in the Web Callback page or the Chat Request page.
phoneNumber	Phone number that the customer entered in the Web Callback page or Chat Request page.
countryCode	If the current interaction is predictive or preview, this parameter has the value from the country code column in the dialer list.

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