

# ORACLE®

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## Contact Center Anywhere

**Predictive Project  
Quick User Guide**

*May 16, 2011*

**ORACLE** CERTIFIED  
PARTNER  

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**promero**

# Preface

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This product guide is divided into chapters; each chapter describes a specific topic. Certain typographical conventions are used throughout this product guide. See below:

- All commands you enter via keystrokes appear in bold (e.g., Press **Enter** or Press **Ctrl-I**).
- All text commands you enter into text boxes or other command line typing appear in italics (e.g., type *active*).
- All pull down menu options, figure references, and table references appear in italics in the menu order to select (i.e., Choose *File> Open*).
- There are three types of special text that are designed to reveal supplemental information: Note, Warning, and Caution. See below.



A **NOTE** provides additional, helpful information. This information may tell you how to do a certain task or just be a reminder for how-to's given in previous sections



A **WARNING** provides information about how to avoid harm to your system (i.e., do not delete your company).



A **CAUTION** provides information about how to avoid malfunction or unwanted Results (i.e., When using the IN logic always separate text with a single quote).

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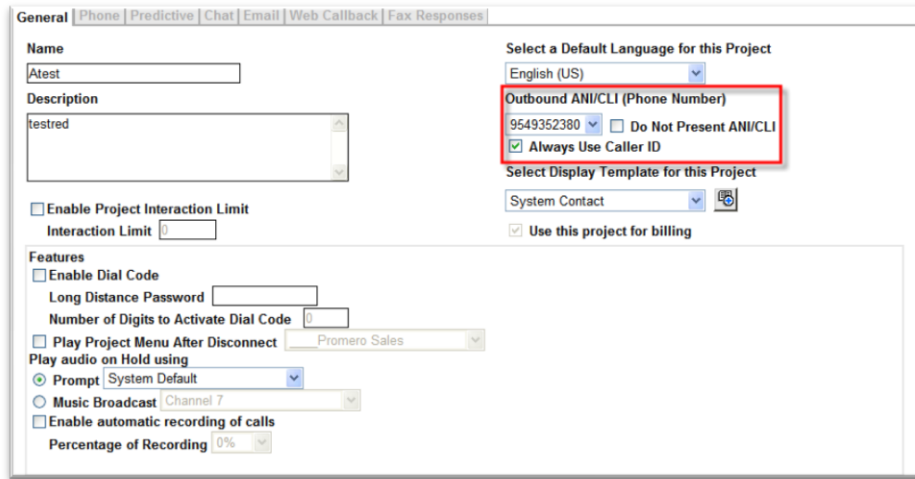
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# Chapter 1: Business to Business Dialing

## Send ANI

It is important to send a valid caller id (ANI) when dialing to enable the persons being dialed to return your call. On the general tab of the project to be dialed is the setting to allow this; a dropdown labeled Outbound ANI/CLI:

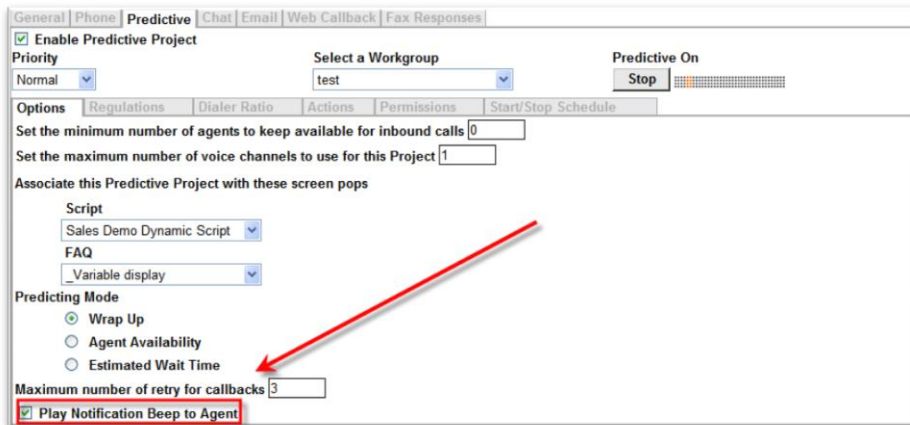


## Voice Channels, and Play Notification Beep to agent

On the predictive tab is the Maximum Number of Voice Channels to be used and the Play notification beep to agent setting, check so that agents hear a short beep when they connect to a predictive call. The Maximum Number of Voice Channels should be set to 1.5 times the number of agents logged in. Number of Retry should be set to between 5 and 10 (based on your specific needs)



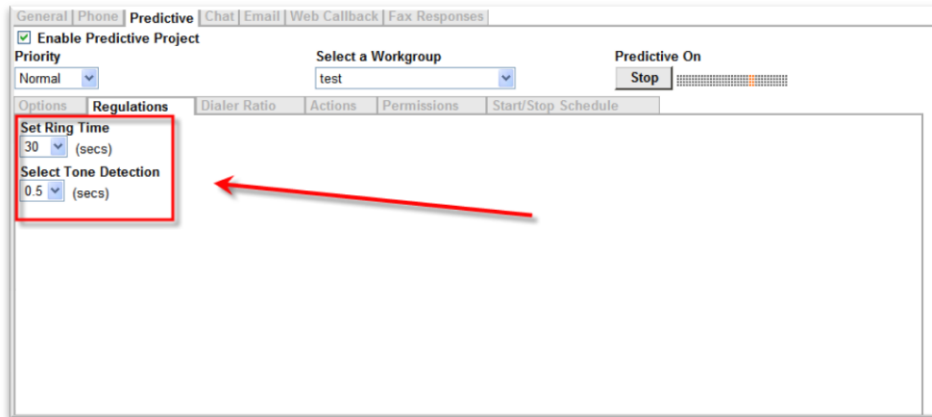
(Note: The number of times a callback contact record is called is based on specific campaign requirements this suggested value is a typical setting used by most user)



## Ringtime and tone detection

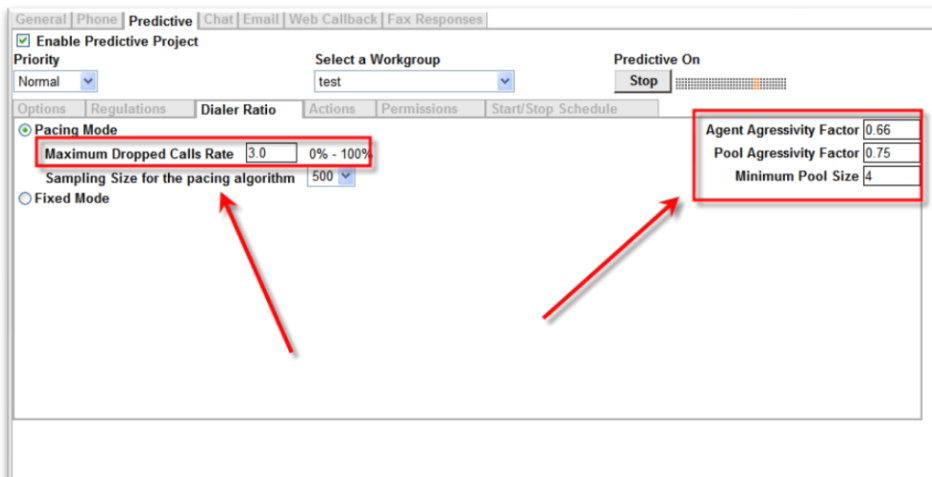
The ringtime setting on the regulations tab specifies how long, in seconds, the system will let a call ring before determining it as no answer, for Business to Business dialing, 30 seconds of ringtime is optimal,

From the Tone Detection 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.) For Business to Business dialing 0.5 seconds is optimal



## Maximum Dropped Call Rate and Aggressivity Factors

Type the maximum percentage of dropped predictive calls to allow in the Maximum Dropped Call Rate field, this should be set to 3.0, and the Aggressivity factors should remain at the default setting, and the Sampling size should be set to 300



## Actions

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.)

If Answering Machine -> Connect agent



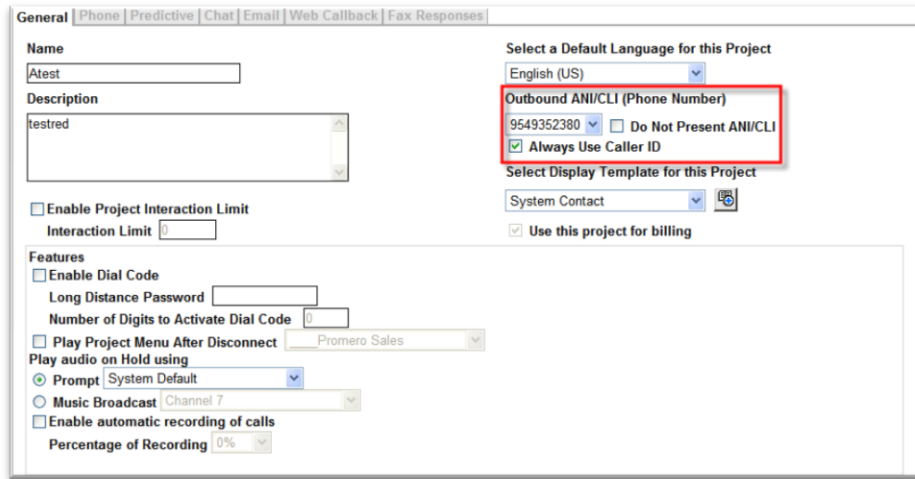
(Note: This is based on campaign needs however, this is a typical setting to ensure IVR and automated attendants can be navigated by the user)

The screenshot shows a software configuration window with several tabs: General, Phone, Predictive, Chat, Email, Web Callback, and Fax Responses. The 'Predictive' tab is active. At the top, there is a checkbox for 'Enable Predictive Project' which is checked. Below this are fields for 'Priority' (set to 'Normal'), 'Select a Workgroup' (set to 'test'), and 'Predictive On' (with a 'Stop' button and a progress indicator). A secondary tab bar includes 'Options', 'Regulations', 'Dialer Ratio', 'Actions', 'Permissions', and 'Start/Stop Schedule'. The main area is divided into several conditional sections: 'If Busy', 'If No Answer', 'If Fax', 'If Invalid', 'If Answering Machine', and 'If Answer'. Each section contains an 'Action' dropdown menu and 'Days' and 'Hour' dropdown menus. The 'If Answering Machine' section is highlighted with a red border, and a red arrow points to the 'Connect Agent' option in its 'Action' dropdown. Other sections like 'If Busy' have 'Callback' as the action, and 'If Answer' has 'Connect Agent' as the action.

# Chapter 2: Business to Consumer Dialing

## Send ANI

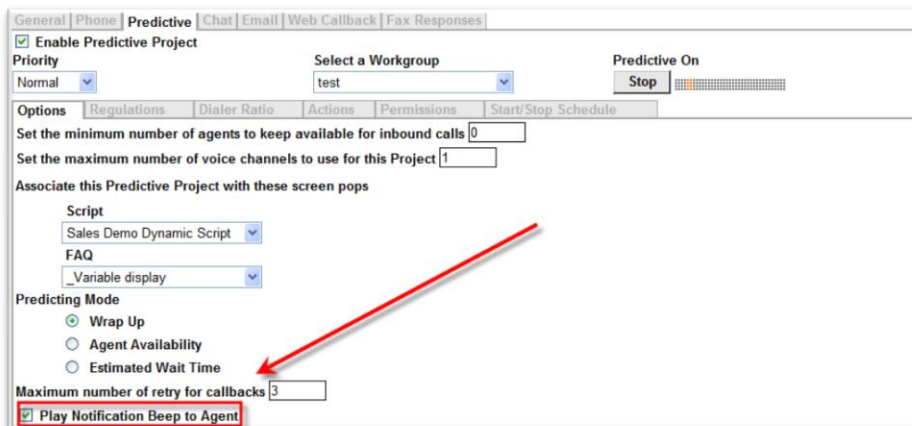
It is important to send a valid caller id (ANI) when dialing to enable the persons being dialed to return your call. On the general tab of the project to be dialed is the setting to allow this; a dropdown labeled Outbound ANI/CLI:



## Voice Channels, and Play Notification Beep to agent

On the predictive tab is the Maximum Number of Voice Channels to be used and the Play notification beep to agent setting, check so that agents hear a short beep when they connect to a predictive call. The Maximum Number of Voice Channels should be set to 2 times the number of agents logged in. Number of Retry should be set to 10

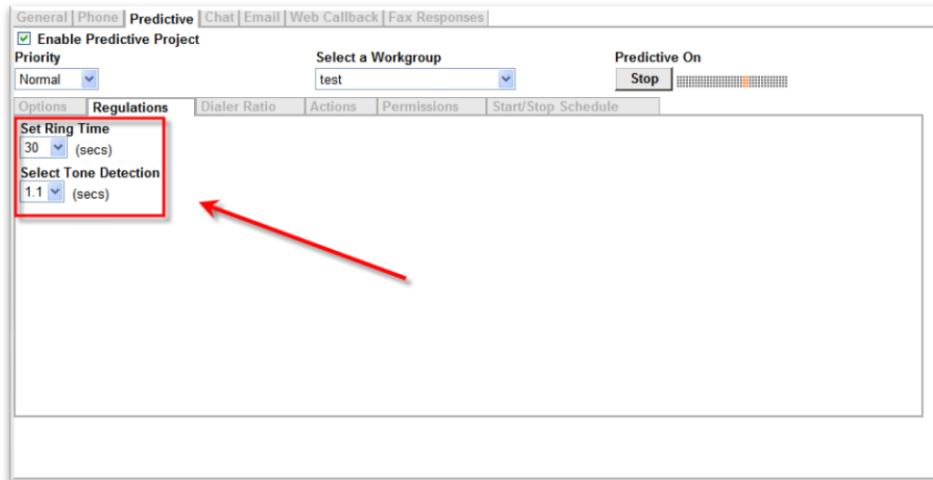
*F.Y.I.* (Note: The number of times a callback contact record is called is based on specific campaign requirements this suggested value is a typical setting used by most users)



## Ringtime and tone detection

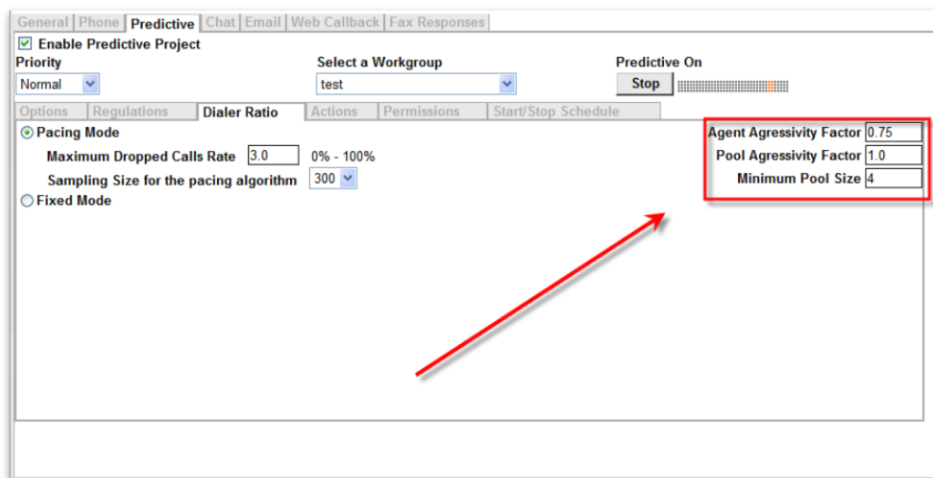
The ringtime setting on the regulations tab specifies how long, in seconds, the system will let a call ring before determining it as no answer, for Business to Consumer dialing, 30 seconds of ringtime is optimal,

From the Tone Detection 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.) For Business to Consumer dialing 1.1 seconds is optimal



## Maximum Dropped Call Rate and Aggressivity Factors

Type the maximum percentage of dropped predictive calls to allow in the Maximum Dropped Call Rate field, this should be set to 3.0, and the agent Aggressivity factor should be set to 0.75 and the pool size set to 1, and the Sampling size should be set to 500





## Actions

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.)

Actions: If Answering Machine -> Route to project

*F.Y.I.*

(Note: This provides flexibility to leave messages, play an IVR or any other call treatments based on specific campaign needs)

Actions: Answer -> Connect Agent.

If no agent available -> Route to project

*F.Y.I.*

(Note: This provides flexibility to leave messages, play an IVR or any other call treatments based on specific campaign needs)

The screenshot displays the 'Predictive' configuration page with the following settings:

- General:**  Enable Predictive Project
- Priority:** Normal
- Select a Workgroup:** test
- Predictive On:** Stop
- Options:** Regulations, Dialer Ratio, Actions, Permissions, Start/Stop Schedule

Condition-specific actions are configured as follows:

- If Busy:** Action: Callback, Days: 0, Hour: 23
- If No Answer:** Action: Callback, Days: 0, Hour: 23
- If Fax:** Action: Out of List
- If Invalid:** Action: Out of List
- If Answering Machine:** Action: Route to Project, Select Project, Atest
- If Answer:** Action: Connect Agent, If No Agent Available: Route to Project, Select Project, Atest

Red arrows point to the 'If Busy' and 'If Fax' sections, and a red box highlights the 'If Answering Machine' and 'If Answer' sections.

# Chapter 3: Dialer Lists

The dialer list is the data that will be used by the system to make outbound calls. The dialer list must meet the following criteria:

- CSV format
- A column for country code
- A column for phone numbers
- A column for company
- A column for project

## To upload a dialer list

1. On the Options side menu, click Projects and then navigate to the desired project.
2. Once in the desired project, click the Dialer Lists tab.
3. Click the Plus sign:

General	Description	Original File Name	Uploaded Date	File Size
<input checked="" type="checkbox"/> MINIREHASH		miniRehash 0405112 av.csv	05/12/2011	379.20 KB
<input checked="" type="checkbox"/> sample pred list	sample list east	sample_csv2.csv	03/01/2011	1.59 KB



The **Select Pattern Matching Field CAUTION** will overwrite the data contained within the column selected. The column selected for pattern matching data to be written should be non-numerical field such as Department.

The Add Dialer List window appears:

**F.Y.I.**

3. On the Add Dialer List window (above):
  - Type a name for the dialer list in the General field
  - Type a short description of the dialer list in the description field
  - Under Import New List, click Browse and then find the CSV file.
4. Click Next.

The **Map Fields to this Display Template** screen appears.

1.Identity		13.Phone		
2.Company	Lead ID	14.Work	Country Code	DaytimePhone
3.First Name	FirstName	15.Extension	None	
4.Last Name	LastName	16.Fax	None	None
5.Title	Disposition	17.Cell	None	None
6.		18.Home	Code	EveningPhone
7.Address		19.Others		
8.Street	None	20.E-mail	None	
9.City	None	21.Home-page	None	
10.State/Provi...	State	22.Department	None	
11.Country	None	23.Pager	None	None
12.Zip/Postal	ZipCode	24.		

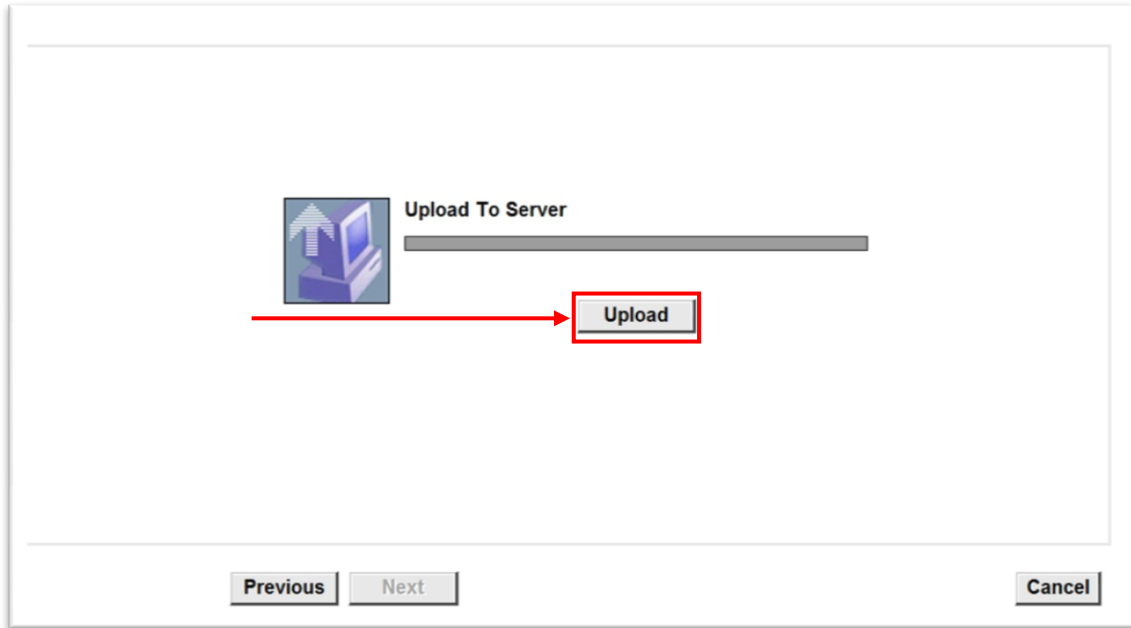
5. Associate (map) the columns in the dialer list (csv file) with the fields in the contact template via the drop down menus

**F.Y.I.**

This association is the only way that Administration Manager can determine the data in the dialer list.

Notice that:

- FYI
    - 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.
6. Click Next



7. Click Upload.
8. After the dialer list finishes uploading, click Close window.

The CSV file appears in the Dialer List tab.

Outcomes | Workgroup Prompts | **Dialer Lists**

General | Phone | Predictive | Chat | SMS | Email | Web Callback | Fax Responses

Select Phone Field: Home  
 Select Last Name Field: Last Name  
 Company Name Field: Company

Select Pattern Matching Field: Department  
 Select First Name Field: First Name  
 Other Field: None

General	Description	Original File Name	Uploaded Date	File Size
<input checked="" type="checkbox"/> MINIREHASH		miniRehash 0405112 av.csv	05/12/2011	379.20 KB
<input checked="" type="checkbox"/> sample pred list	sample list east	sample_csv2.csv	03/01/2011	1.59 KB

9. Click **Apply**. The Dialer List upload is complete when the new list appears on the above **Dialer List** tab.

## Time Zones

When starting a predictive project manually, Oracle Contact Center Anywhere tries to dial all numbers in the project's dialer lists. To dial only the selected numbers, **time zones** or to make calls at specific times, you must create a Start/Stop Schedule. Before starting or scheduling a predictive project, ensure that the specified conditions are met within Administration Manager and CCA Reports:

### Administration manager

1. From the Navigation pane, click Libraries, **Matching Patterns**. Do one of the following:
2. Click **Add** and the Matching Patterns screen opens.
3. Complete the Matching Patterns screen, and click OK.
  - a. The following table describes the fields.

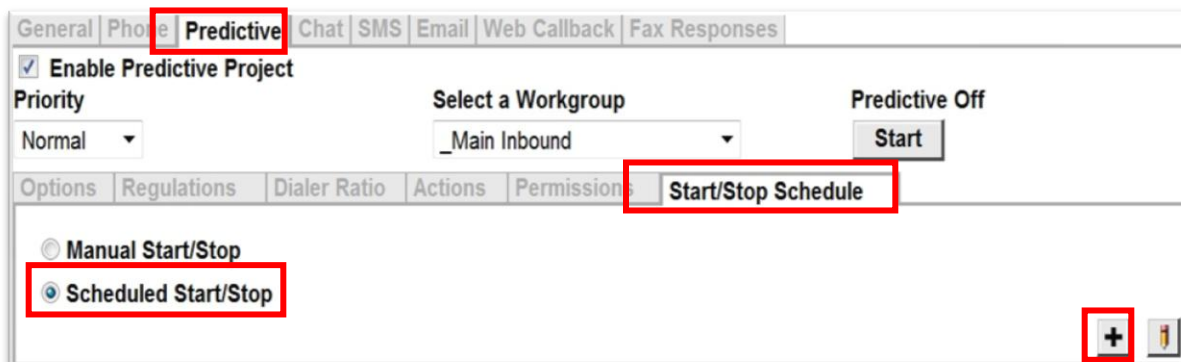
Field	Description
Name	Type a name that identifies the purpose of this pattern.
Pattern	Type a string pattern. The suggested string pattern for time zones is the first letter of the time zone. For example, type in the letter C to represent the central time zone.
Description	Type a description for this pattern to help identify it quickly in your Matching Patterns library.

4. Repeat Step 3 of this procedure until all the matching patterns that your contact center requires are created. Click OK
5. From the Navigation pane, click Libraries, **Pattern Matching Groups**.
6. Click **Add** and the Pattern Matching Groups screen opens.
  - a. The following table describes the fields.

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.

7. Repeat Step 6 of this procedure until all the Pattern Matching Groups required for your contact center are created. Then Click OK.

8. Within the project, that contains the list you wish to dial,
  - a. click on the **Predictive** tab and
  - b. click on the **Start/Stop Schedule** sub tab
  - c. click on the **Scheduled Start/Stop** radio button
  - d. click the **Add** icon and the Weekly Predictive Schedule window appears

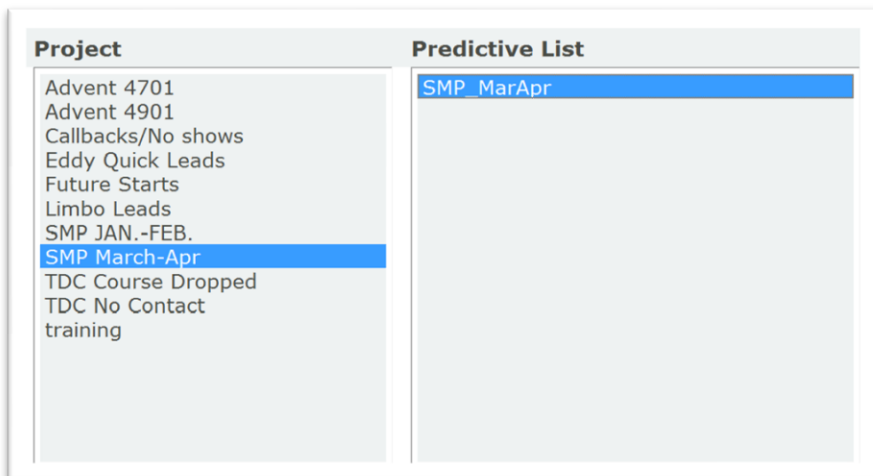
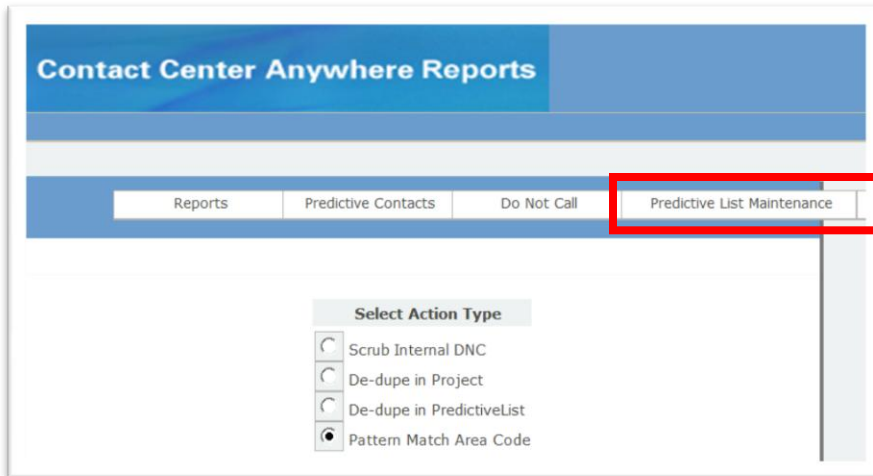


- e. Type in a name for the predictive schedule in the name field
- f. Select **Use Contact Customized field for Matching**, and select the desired time zone's Pattern Group.
- g. From the **Days** drop-down list, select the days that the predictive dialing schedule runs (such as Monday through Friday).
- h. From the **Daily Hours** drop-down list, select when the predictive dialing schedule runs (such as 8:00 A.M to 5:00 P.M.).
- i. From the **Time Zone** drop-down list, select where the project runs.
- j. Click OK to save the schedule.
- k. In the Predictive tab, click OK.

## CCA Reports

After entering the Start/Stop schedule in the Administration Manager, the dialer list will need to be scrubbed against the Pattern Match Area Code within **CCA Reports**.

1. Sign in to CCA Reports
2. Click on Predictive List Maintenance
3. Under Select Action Type; click the **Pattern match Area Code** radio button.



4. Within the **Project** selection area, select the desired project.
5. With the **Predictive List** selection area select the desired project.
6. Click **Update Contacts**

## List Activation

There are two steps to activating a list; first the Project needs to be started. To do this log into the Administration Manager, go to Projects → your project name → and then Predictive. Select Start/Stop. Select the start type for the project either Manual or Schedules mode and then click on the Start button. You will see the start progress indicator cycling back and forth, click the Apply button, the Project is now started.

Take note that the list of authorized Supervisors is selected in the Permissions tab. The next step will require the Supervisor to activate a list and they will only be able to do so if the Administrator has authorized them in the Permissions tab.

Be sure that the Permission is done before the Supervisor logs in.

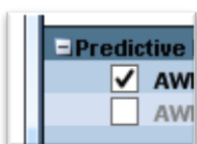


(Note: After the Administrator has given this authorization to the Supervisor, if the Supervisor was already logged in, they should log off, close the CCA window close their browser. Open a new browser and log back in)

The second step to List Activation is done in the Supervisors screen. The Supervisor should navigate to the Outbound Control Tab.



The supervisor will then need to expand out the Project name they wish to activate and then to check off the list to dial.





# Contact and Support Information

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