

Oracle® Contact On Demand

Administration Manager Guide

Version 8.2.1, Rev. A

E27270-01

July 2012

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Preface

This guide describes the features and functionality of Administration Manager.

Audience

This guide is intended for users of Administration Manager.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Related Documents

For more information, see the following documents on Oracle Technology Network:

- *Oracle Contact On Demand Supervision Manager Guide*
- *Oracle Contact On Demand Interaction Manager Guide*
- *Oracle Contact On Demand Release Notes* on My Oracle Support

Conventions

The following text conventions are used in this document:

Convention	Meaning
<i>italic</i>	Italic type indicates book titles, emphasis, a defined term, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, code in examples, text that appears on the screen, or text that you enter.

What's New in This Release

This chapter lists new features and changes.

What's New in Oracle Contact On Demand Administration Manager Guide

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

Table 1-1 *What's New in Oracle Contact On Demand Administration Manager Guide, Version 8.2.1*

Topic	Description
"Full Feature Company Package for Oracle Contact On Demand" on page 5-2.	Modified topic. The Full Feature Package table has been updated to reflect the following additions and changes: <ul style="list-style-type: none"> Simple CRM - Contacts Enable CRMOD
"Creating a Company Package" on page 5-6.	Modified topic. It describes assigning packages for a company to enable feature sets. The topic has been updated to identify that it is a step in the configuration of the integration between Oracle Contact On Demand and Oracle CRM On Demand.
"Creating a New Company Using the Company Creation Wizard" on page 5-8.	Modified topic. It describes using the company creation wizard. The topic has been updated to include: <ul style="list-style-type: none"> Setting active user limits Maximum number of active users Provisioned and active user limit statistics
"Controlling Company Licensing" on page 5-28.	Modified topic. Added information about the License tab that is used to control a company license for custom applications, Web services, and active user limit.
"Enabling Web Services" on page 5-29.	New topic. It describes how to define Web services for a company.
"Adding or Editing a URL Library" on page 6-51.	Modified topic. It describes compiling a library of Uniform Resource Locators (URLs) or Web pages. The topic has been updated to support adding a WebServices Host URL to the library.
"About Creating and Deleting Libraries" on page 6-23.	Modified topic. It describes how to create libraries. The topic has been updated to include the definition of IMAP servers.
".Adding or Editing an Agent Statuses Library" on page 6-26.	Modified topic. It describes the predefined system states and interaction statuses. Added the status, DND - Supervising to the table.

Table 1–1 (Cont.) What's New in Oracle Contact On Demand Administration Manager Guide, Version 8.2.1

Topic	Description
"Adding or Editing an Inbound Email Server Library" on page 6-40.	Modified topic. It describes how to create a POP3 Server Library. The topic has been updated to reflect the change in navigation and the addition of the ability to specify the server type.
"Adding or Editing an IMAP Server" on page 6-42.	New topic. It describes how to create an IMAP Server Library and configure SSL support.
"Adding or Editing an SMTP Server Library" on page 6-50.	Modified topic. It describes how to create an STMP Server Library. The topic has been updated to describe adding a port definition.
"Creating an CRMOD Integration Library" on page 6-57.	New topic. It describes how to create CRMOD Integration Libraries. The integration of Oracle Contact On Demand and Oracle CRM On Demand allows for the display CRMOD data within Oracle Contact On Demand. COD provides the interaction control, telephony management, and presentation of the CRMOD data in Interaction Manager.
"Adding or Editing User Accounts" on page 8-3.	Modified topic. It describes creating user accounts. The topic has been updated to allow you to identify whether an agent is active or inactive. The topic has been updated to identify that it is a step in the configuration of the integration between Oracle Contact On Demand and Oracle CRM On Demand.
"Configuring Controls and Restrictions for an Agent" on page 8-7.	Modified topic. It describes setting controls and restrictions for an agent. The topic has been updated to identify that it is a step in the configuration of the integration between Oracle Contact On Demand and Oracle CRM On Demand. The Agents and Controls Restrictions table has been updated to include: <ul style="list-style-type: none"> ■ Ring time for agents to answer incoming calls ■ Integration of COD and CRMOD for the handling of interactions
"Configuring Controls and Restrictions for an Agent" on page 8-7.	Modified topic. It describes setting controls and restrictions for an agent, including the ring time for incoming calls. The topic has been updated to identify that it is a step in the configuration of the integration between Oracle Contact On Demand and Oracle CRM On Demand.
"Creating an CRMOD Integration Library" on page 6-57.	New topic. It describes how to create CRMOD Integration Libraries. The topic is a step in the configuration of the integration between Oracle Contact On Demand and Oracle CRM On Demand.
"Configuring CRMOD Web Services and Servlet API's for a CRMOD Integration Library" on page 6-57.	New topic. It describes the configuration of CRMOD Web services and Servlet APIs for integration with Oracle Contact On Demand.
Appendix F, "Integrating Oracle Contact On Demand with Oracle CRM On Demand."	New appendix. It describes how to configure the integration between Oracle Contact On Demand and Oracle CRM On Demand.

Table 1–1 (Cont.) What's New in Oracle Contact On Demand Administration Manager Guide, Version 8.2.1

Topic	Description
"Real Time Tenant Summary Report" on page 21-40.	Modified topic. It describes the Real Time Tenant Summary Report. The elements of the report were updated to include: Roadmap for configuring the integration of COD and CRMOD. <ul style="list-style-type: none"> ■ WebServices URL ■ Licensed Sessions ■ Active Sessions ■ Exceeded Sessions
"Integrating CRM with the Internet or a Win32 Application" on page 5-17.	Modified topic. It describes configuring custom tabs. Updated the available options to include the ability to create a base URL for a company for the integration of Oracle Contact On Demand and Oracle CRM On Demand.
"Admin Audit Report" on page 21-34.	Modified topic. It describes the Admin Audit Report, which details company-privacy information that includes the changes to historical data made in Administration Manager.
"About Administration Manager" on page 2-1.	Modified topic. It describes the features and functionality of Administration Manager. Updated the required version of Internet Explorer.
"Question 1: What Kinds of Interactions Will the Contact Center Accept?" on page 3-1.	Modified topic. It describes the types of interactions that a contact center accepts. Added Web callback media interaction to the list of media types that a contact center will accept.
"Starting Administration Manager for the First Time" on page 4-2.	Modified topic. It describes how to start Administration Manager for the first time. Updated the required version of Internet Explorer.
"Restrictions for Account Permissions" on page 8-7.	Modified topic. It describes the restrictions that you can apply to account permissions. Added a parameter that allows supervisors to control workgroup membership assignment.
"Creating Play Value Menus" on page 11-14.	Modified topic. It describes how to play a prompt to a caller or read the contents of a defined variable to the caller. New prompts have been added to support currency, number, spelling, and date and time values. Additional changes include localized date, time and number formats, time of day prompts, and time on the hour prompts.
Chapter 12, "Overview of Campaign Management."	Modified chapter. It provides an overview of campaign management and its components.
Chapter 13, "Working with Campaigns."	Modified chapter. It describes how to create campaigns to include a roadmap for designing a campaign, the process of defining the call workflow, managing campaign nodes, menu routing conditions, and changing campaign settings.
Chapter 14, "Working with Campaign Manager Features."	Modified chapter. It describes how to configure the behavior of the campaign to include, setting node actions and variables, sending email from the campaign, and running SQL queries.
"About System Variables" on page 14-11.	Modified topic. It describes the variables, expressions, and functions that are available in Oracle Contact On Demand.
"Adding Actions to Nodes" on page 14-1.	Modified topic. It describes how to automatically send an email with an attached recording. Additional changes include specifying a URL for use with Oracle CRM On Demand.
"About Menu Type Routing" on page 14-9.	Modified topic. It describes how to route a caller to a feature inside or outside a campaign. The ability to define an external number was added.

Table 1–1 (Cont.) What's New in Oracle Contact On Demand Administration Manager Guide, Version 8.2.1

Topic	Description
"Adding Email Interactions to a Project" on page 15-16.	Modified topic. It describes how to configure email for a project.

Additional Changes

The documentation also contains the following general changes:

- Editorial changes.

Overview of Administration Manager

This chapter describes Oracle Contact On Demand Administration Manager, its features, and the call workflow in a typical contact center. It includes the following topics:

- [About Administration Manager](#)
- [Product Features of Administration Manager](#)
- [Administration Manager Interface](#)
- [Oracle Contact On Demand Reports](#)

About Administration Manager

Administration Manager is a browser-based software program that allows administrators to set up, configure, and maintain an Oracle Contact On Demand multimedia contact center. No programming experience is required to administer a 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 administrators through the contact center planning process, and describes how to use Administration Manager to implement the contact center.

Note: For more information on browser support, see the Compatibility Matrix in the *Oracle Contact On Demand Release Notes on My Oracle Support*.

Product Features of Administration Manager

Using Administration Manager, 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 client
- Preventing agents and the Oracle Contact On Demand automated callback features from calling specific phone numbers
- Segmenting the configurations for customers within a single company in the contact center (optional)

Administration Manager Interface

The Administration Manager browser-hosted interface, provides logically grouped controls for quickly navigating to all Administration Manager screens. The Administration Manager interface is divided into two panes that you can resize and an optional third pane:

- **Navigation pane.** Contains five groups of links to various Administration Manager screens. As you click links in the Navigation Pane, Administration Manager 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.

Note: The Administration Manager Options, Library, Reports, and Custom Reports links contain no objects for editing, until you add them.

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

Oracle Contact On Demand Reports

Use Administration Manager to define, generate, and view the full suite of Oracle Contact On Demand reports. For more information about standard and advanced reports, see [Chapter 20, "Working with Standard Reports"](#) and [Chapter 21, "Working with Advanced Reports."](#)

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 topic:

- [Using the Administrator's Planning Survey](#)

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 Oracle Contact On Demand features to implement. Use the answers to the survey questions to guide you later when you use Administration Manager to set up the contact center. Use the following pages to record your answers to *Administrator's Planning Survey*.

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

Use [Table 3-1](#) to identify how customers will contact the contact center. Place a check mark next to all media types the contact center will accept.

Table 3-1 *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.
	Preview Dialing	The Oracle Contact On Demand provides the next contact in the outbound dialer list, allows agents to preview the contact information, and controls the placement of the call.
	Voice	Customers dial in to the contact center using their telephones.
	Web Chat	Customers reach the contact center by using your Web site to initiate a chat session with an agent.
	Web Callback	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 3–2) to reach various phone projects in the business:

Table 3–2 Phone Projects and Corresponding Telephone Numbers

Phone Project Name	Telephone Number

Oracle Contact On Demand 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 Oracle Contact On Demand 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 3–3) to reach various contact center projects in my business:

Table 3–3 Email Address and Corresponding Departments or Workgroups

Email Address for Return	Project or Specific

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 3–4) to reach various fax projects in my business.

Table 3–4 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 3–5) to reach various projects.

Table 3–5 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?

Oracle Contact On Demand allows the contact center to manage interactions originating from different media in different ways. For example, a customer who calls the contact center by phone identifies his or her needs using a menu, Oracle Contact On Demand then routes the call to an agent in the correct workgroup. Alternatively, all chat interactions might route 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, IVR, or other resource). Understanding how to route interactions of each media type is important for setting up Oracle Contact On Demand projects and workgroups using Administration Manager.

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

Oracle Contact On Demand 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.

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. For more information on recording prompts, see "[Recording the Prompt](#)" on page 7-3.

Table 3–7 Project or Workgroup and a Corresponding Sound File or Text Greeting

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

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 3–8](#) to identify the sound files and prompt text.

Table 3–8 Sound File or Prompt Text

Filename (.wav)	Text for the Prompt

Tip: For information on how to create menus, see "[Creating Standard Menus](#)" on page 11-5, and for information on how to record prompts describing the menus, see "[Recording the Prompt](#)" on page 7-3.

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, they can hear other recorded messages 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 Your estimated wait time is one minute) are examples of Workgroup Queue prompts. For more information on workgroup queue prompts, see "[Workgroup Option Prompts](#)" on page 7-12.

Although Oracle Contact On Demand 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. Oracle Contact On Demand 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, Oracle Contact On Demand routes the caller to the available agent with the highest score for the Speaks Spanish skill.

Use [Table 3-9](#) to identify and describe the agent skills for the contact center.

Table 3-9 Agent Skills and Corresponding Descriptions

Skill	Description

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

Oracle Contact On Demand identifies the status of every agent who is logged in to the contact center. Supervisors use these status indicators to monitor agent activity. Agents depend on their status indicator to control their availability. For more information on predefined system statuses, see "[Adding or Editing an Agent Statuses Library](#)" on page 6-26.

If you want additional agent statuses to reflect the activities of the agents in your contact center, identify them in [Table 3-10](#).

Table 3-10 Additional Agent Status Indicators and Descriptions

Agent Status	Description or Purpose

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 3-11](#), 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 3-11 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 3-12](#), identify a question, answer, or supporting URL.

Table 3-12 Question, Answer, or 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 3-13](#), list the URLs that agents can use when serving customers.

Table 3-13 Web Page Name, Description, and URL

Web Page Name	Description
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 3-14](#) 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 3-14 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:	

Table 3–14 (Cont.) Chat Event, Name, Description, and URL

Chat Event	Name	Description
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 3–14](#), and place them on your Web server in the URL location that you specify in [Table 3–14](#).

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 3–15](#), provide a name for the Web callback response content, a description of the content, and the URL containing the text.

Table 3–15 Web Callback Response Name, Description, and URL

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 3–16](#), identify the subject of the email response, the URL containing the email response text, and workgroup that will use each prepared email.

Table 3–16 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 3-17](#), identify the name of the fax response, and the path and filename containing the fax contents.

Table 3-17 Fax Name and Corresponding File

Fax Name	Filename (.TIF or.TIFF)

Caution: You must store Oracle Contact On Demand 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 Oracle Contact On Demand 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 Oracle Contact On Demand to automatically display the outcome library and require agents to choose an outcome at the end of every interaction. In [Table 3-18](#), identify the outcome you create for the Outcome library. (Some example outcomes are: Placed Order, Issue Resolved, Issue Pending, and so on.)

Table 3-18 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 Oracle Contact On Demand can send automatically to customers who reach the contact center by email. Typically, the content of the automated reply email is like: *Thank you for your inquiry, an agent will be contacting you shortly.* In [Table 3-19](#), identify the subject of each automated email reply that you use with the contact center.

Table 3–19 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?

You can specify multiple email servers for automatic load balancing of email traffic. Identify the email servers in [Table 3–20](#).

Table 3–20 Email Servers, Hosts, Usernames, and Passwords

Inbound Email Servers	Type	Host	Username	Password

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

Oracle Contact On Demand allows you to specify multiple email servers for automatic load balancing of email traffic. Identify them in [Table 3–21](#).

Table 3–21 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?

Oracle Contact On Demand supports agent and supervisor workstation connections through a proxy server. Use [Table 3–22](#) to list the proxy servers to which agents and supervisors will connect. For more information on changing Internet Explorer proxy settings, see "[Setting Internet and Intranet Security](#)" on page 15-15.

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 3–22 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:

Getting Started with Administration Manager

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

- [Roadmap for Setting Up Your Contact Center in Administration Manager](#)
- [Synchronizing Server Time and Time Zone](#)
- [Starting Administration Manager and Logging In](#)
- [About Setting the Proxy Information](#)
- [Process of Configuring Administration Manager](#)
- [Call Workflows](#)

Note: Make sure to complete the *Administrator's Planning Survey* and keep the survey responses for later reference. For more information, see [Chapter 3, "Planning a Contact Center."](#)

Roadmap for Setting Up Your Contact Center in Administration Manager

Administration Manager supports a large number of features, options, and settings. You can configure many of the features in Administration Manager 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 Administration Manager in a specific order. For example, you must have your Inbound Email Server information to hand before you configure your company and agents.

To set up a simple contact center, perform the following process and tasks:

- ["Adding or Editing a DNIS Library"](#) on page 6-36
- ["Adding Email Interactions to a Project"](#) on page 15-16
- ["Process of Configuring Administration Manager"](#) on page 4-3
- ["Adding or Editing an Inbound Email Server Library"](#) on page 6-40
- ["Adding or Editing an SMTP Server Library"](#) on page 6-50
- ["Adding or Editing an SMTP Groups Library"](#) on page 6-49
- ["Creating or Editing a Company"](#) on page 5-7
- ["Adding or Editing an Agent Skills Library"](#) on page 6-24
- ["Adding or Editing User Accounts"](#) on page 8-3

- ["Adding or Editing a Workgroup"](#) on page 10-2
- ["Adding or Editing a Project Definition"](#) on page 15-1

Synchronizing Server Time and Time Zone

It is critical that all Oracle Contact On Demand servers are set to the same time (if you are using servers with Windows as the operating system, use the date and time properties). 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 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 Administration Manager, you must use your browser to open the Administration Manager Login screen, in the same way that you load a typical Internet Web site in a browser. If you are logging in through a proxy server, or want to set up Oracle Contact On Demand to use a proxy server, see ["Proxy Servers"](#) on page 9-1.

Starting Administration Manager for the First Time

This topic describes how to start Administration Manager for the first time.

To start Administration Manager for the first time

1. Start Internet Explorer.

Note: For more information on browser support, see the Compatibility Matrix in the *Oracle Contact On Demand Release Notes on My Oracle Support*.

2. Enter the address of Administration Manager 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 system is configured as multi-tenant:
 - Type system in the Company Alias field.
 - Type netadmin in the User name field.
 - Type the password (provided by Oracle) in the Password field.
3. Click the Administration Manager icon.

The Administration Manager screen opens to either the NetAdmin Functions screen, or the Company Profile screen, depending on your configuration. When you log in as a NetAdmin user, you will proceed to the NetAdmin menu.

About Setting the Proxy Information

A proxy server is a program that acts as an intermediary between computers on your Local Area Network (LAN) and computers on the Internet. Because 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. Oracle Contact On Demand gets proxy information from the administrator's browser.

Changing the Proxy Information

This topic describes how to change the agent's proxy information.

To change the proxy information

1. Start Internet Explorer. From the Tools menu, choose Internet Options.
2. In the Internet Options window, select the Connections tab, then click LAN Settings.
3. In the Local Area Network Settings window:
 - Select the Use a Proxy Server for Your LAN box.
 - In the Address field, type the IP address of the proxy server.
 - In the Port field, type the proxy server port number, and then click OK.

Process of Configuring Administration Manager

To configure your Administration Manager workstation, perform the following tasks:

- ["Setting Your Regional Options \(Language, Time Zone, Date Format\)"](#) on page 4-3
- ["Configuring Your Inactivity Time-out"](#) on page 4-4
- ["Setting Up the Company Email Addresses"](#) on page 4-4

This process is a step in the ["Roadmap for Setting Up Your Contact Center in Administration Manager"](#) on page 4-1.

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.

This task is a step in ["Process of Configuring Administration Manager"](#) on page 4-3.

To set your regional options

1. Click Configure on the top bar of the Administration Manager user interface, and then click the Regional Options tab.
2. From the Select Language list, select your language.
3. 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 list.
4. 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 list. You can choose from the following formats:
 - mm/dd/yyyy
 - mm-dd-yyyy
 - dd/mm/yyyy
 - dd.mm.yyyy
 - dd-mm-yyyy
 - yyyy-mm-dd
 - yyyy/mm/dd
 5. Click OK to save your configuration settings.

All Administration Manager screens display text in the language that you selected. All dates and times are in the time zone and format that you selected.

Configuring Your Inactivity Time-out

You can set an inactivity time-out for Administration Manager, so that if it is idle (that is, there are no mouse clicks or keystrokes) for the period you specify, it automatically logs you out.

This task is a step in "[Process of Configuring Administration Manager](#)" on page 4-3.

To set your inactivity time-out

1. Click Configure on the top bar of the Administration Manager user interface, and then click the Timeout tab.
2. In the Timeout After field, enter the number of minutes after which Administration Manager automatically logs you out, and then click OK to save your configuration settings.

Setting Up the Company Email Addresses

Use the Email Configuration tab to supply, edit, or view the email addresses and servers that Oracle Contact On Demand uses to handle incoming email interactions and outgoing agent responses for your company (or the company for which you are providing contact center services).

This task is a step in "[Process of Configuring Administration Manager](#)" on page 4-3.

To set up the company email addresses

1. Click Options, Company, select the company you want to configure, and then click the Email Configuration tab.
2. Complete the Email Configuration - General Addresses fields.

The following table describes the fields.

Field	Description
Voice Mail address	Type the email address to use as the return address for emails sent to agents, which contain voice mail attachments. If a problem occurs delivering an email containing a voice mail attachment to the agent, Oracle Contact On Demand sends the email and attachment to this address.
Fax to Agent	Type the email address to use as the return address for emails sent to agents, which contain fax attachments. If a problem occurs delivering an email containing a fax attachment to the agent, Oracle Contact On Demand sends the email and attachment to this address.
Alarm notification to Supervisor	If an email error occurs, Oracle Contact On Demand sends an alarm notification to this address. This can happen when: <ul style="list-style-type: none"> ■ 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. (Oracle Contact On Demand forwards the email to the alarm address.) ■ The Company Storage Email Address changed. If the storage changes, Oracle Contact On Demand sends an alarm notification to the alarm address and requests that the administrator forward all email from the old storage address to the new storage address. ■ Could not connect to the project's Inbound Email Server. ■ Emails were routed to a project and then the project was deleted. In this case, Oracle Contact On Demand 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. Oracle Contact On Demand 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.
Select an SMTP Group to Send Alarm Notification	Select the SMTP Group that will be used to send alarm notifications.

3. Click the Storage subtab.
4. Complete the Storage subtab fields.
The following table describes the fields.

Field	Description
Email storage address	<p>This address is the address agents will see if you configure Oracle Contact On Demand to conceal the customer's email address from the agent.</p> <p>You must also enter an address (in the Select the storage location field). This address must be from an account on the servers you specify.</p> <p>Even though the agent sees only the address you enter, Oracle Contact On Demand sends the agent's response to the customer's true address. The customer sees the email address for the project.</p> <p>Note: Do not use an email client to access the Oracle Contact On Demand email storage address. This prevents Oracle Contact On Demand from accessing the account used to send agent replies to customers.</p>
Select the storage location	Check the Inbound Email Servers supporting the address you provided for the email storage address.

5. Click Apply.

Call Workflows

The following steps describe the workflow for a call:

1. A customer dials a call to the contact center.
2. Oracle Contact On Demand finds the project, using the number that the customer dialed.
3. Then, Oracle Contact On Demand verifies that the company receiving the call has a valid license.
4. Finally, Oracle Contact On Demand routes the call to a workgroup queue where it waits for the ACD (Automatic Call Distributor) Server to assign the call to an agent.
5. When an agent is available, the CTI Server finds the agent's extension. Oracle Contact On Demand dials the agent's extension, and the Interaction Manager Server offers the interaction to the agent.

For more information about call workflow, see [Chapter 12, "Overview of Campaign Management."](#)

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](#)
- [About Company Packages](#)
- [Creating or Editing a Company](#)
- [Process of Managing Company Information](#)
- [Finding a Company](#)
- [Sorting Columns of Information](#)

About Company Definitions

If you are an Application Service Provider (ASP), Enterprise, or single tenant company 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 the *Administrator's Planning Survey*, and keep the responses available. For more information on planning, see "[Planning a Contact Center](#)" on page 3-1.

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.
- Enter information manually in each of the appropriate Oracle Contact On Demand screens.

About Company Packages

A company package is a set of features applied to a company. It is similar to a template for the feature set. If a feature is not enabled within the package, then that feature will

not appear in the user interface. For example, if a package contains email but not chat, then all of the relevant configuration and report occurrences of email will appear in Oracle Contact On Demand. However, any information related to chat will not appear. Company packages are created to include the required features, and then the package is assigned to a company.

The company package must be created before creating a company. The company package can be assigned manually or as part of the Wizard. If you plan to use the Company Creation Wizard, or if the new company plans to run Preview projects, you must create and save one or more company packages to identify the specific contact center feature sets and media types. You can manually add Preview projects to a company package. Company package changes are not dynamic, which means Oracle Contact On Demand users must log out, and then back in to see the new changes.

Full Feature Company Package for Oracle Contact On Demand

The Full Feature Company Package includes the features in [Table 5-1](#).

Table 5-1 Full Feature Company Package

Feature	Description
Email	Companies can control whether or not to send and receive incoming email media type.
Voice Mail	Voice mail feature allows callers to leave voice mail messages for the workgroup or for an agent. For more information on voice mail, see "Storing Voice Mails (Unified Messaging)" on page 5-29.
Voice Callback	Companies can allow callers enter a number for a callback from an agent at a later time.
Web Callback	The Web callback feature provides a form on a Web site into which a customer can enter a telephone number. A contact center agent can then call the customer back on the number that the customer entered. For more information on Web callbacks, see "Controlling Company Licensing" on page 5-28.
Web Chat	Web chat allows a customer to open a chat session from your Web site to be routed to and handled by an agent. For more information on the Web chats, see "Controlling Company Licensing" on page 5-28.
Preview	Companies can run outbound projects where the Oracle Contact On Demand application presents contacts from a list, to agents to preview prior to placing the call. For more information on preview calling, see Chapter 15, "Creating Projects."
H323	Companies can use an H323 phone type. If this feature is removed from the company package, it will not appear in the phone configuration section when you create a new agent account. It will also not appear in Interaction Manager when an agent makes a call. Note: The ring.wav file that plays upon the receipt of a SIP 180 message and the caller hears, is extended for SIP/H323 calls. For more information on phone configuration, see "Configuring a Phone Type and Extension for an Agent" on page 8-13 and "Configuring Controls and Restrictions for an Agent" on page 8-7.
PBX	Companies can use a Public Branch Exchange (PBX) phone type. If this feature is removed from the company package, it will not appear in the phone configuration section when you create a new agent account. It will also not appear in Interaction Manager when an agent makes a call. For more information PBX configuration, see "Configuring a Phone Type and Extension for an Agent" on page 8-13 and "Configuring Controls and Restrictions for an Agent" on page 8-7.

Table 5–1 (Cont.) Full Feature Company Package

Feature	Description
SIP	Companies can use a SIP (Session Initiated Protocol) phone system. If this feature is removed from the package, it will not appear in the phone configuration section when you create a new agent account. It will also not appear in Interaction Manager when an agent makes a call. For more information on SIP configuration, see "Configuring Controls and Restrictions for an Agent" on page 8-7.
Dialogic Extension	Allows the company to display the phone type Dialog Analog Extension option for agents. You must choose this setting to display the Extension Call option in the Dialer in Interaction Manager.
Outside Phone	Companies can use an outside phone type (remote extension) for remote agents.
Dialing Out	Allows the company to control whether agents can make outbound calls and under what conditions. If this feature is removed from the company package, it will not appear in the phone configuration section when you create a new agent account. It will also not appear in Interaction Manager when an agent makes a call. For more information on dialing out, see "Configuring Controls and Restrictions for an Agent" on page 8-7.
Simple CRM - Contacts	You can provide simple CRM contacts in a company definition. When Simple CRM is enabled, the Contacts tab in the agent's Interaction Manager interface is present. For more information on contacts, see "Integrating CRM with the Internet or a Win32 Application" on page 5-17. Note: If you have Oracle Contact On Demand configured for integration with Oracle CRM On Demand, you must deselect this option to disable it.
CRM	Allows companies to load a unique Web page into a custom tab, or use an external application tab for starting a separate browser on the agent's computer. Companies can then either load a unique Web page into that browser, or start a Win32 application on the agent's computer. For more information on Web page configuration, see "Integrating CRM with the Internet or a Win32 Application" on page 5-17. Note: For integration with Oracle CRM On Demand, you must enable the package with a CRM On Demand URL. For more information on defining a base URL for a company, see "Integrating CRM with the Internet or a Win32 Application" on page 5-17.
CRMOD Enabled	This option allows you to limit the searching of contacts to that within Oracle CRM On Demand. For more information on configuring Oracle Contact On Demand and Oracle CRM On Demand, see Appendix F, "Integrating Oracle Contact On Demand with Oracle CRM On Demand." Note: You must deselect Simple CRM - Contacts, if selected.
Intelligent Email Templates	Companies can use intelligent email templates to scan incoming email interactions for specific keywords, so that Oracle Contact On Demand can then send automatic responses, or provide suggested responses, thus reducing the workload on agents. For more information on email templates, see "Adding or Editing an Intelligent Email Template Library" on page 6-22.
Departure Reason	Information about when and why an agent left the company. For more information on accounts, see "Deleting an Agent Account" on page 8-6.
IVR Server	Companies can transfer their callers to an external Interactive Voice Response (IVR) system. For more information on menus, see "Creating Standard Menus" on page 11-5.

Table 5–1 (Cont.) Full Feature Company Package

Feature	Description
System Prompts	Allows companies to use all prerecorded system prompts (sound recordings) throughout Oracle Contact On Demand. System prompts are general recordings that are provided. They include contact center prompts, date and time prompts, number prompts, agent voice mail prompts, company directory navigation prompts, project option prompts, workgroup option prompts, and call-blocking prompts. For a complete list of the system prompts that are provided, see "Listing All Prompts by Filename" on page 7-16.
Workgroup Prompts	Oracle Contact On Demand uses prompts to provide audible messages to the callers and agents. For example, Oracle Contact On Demand can provide a greeting message to the call, IVR prompts, agent whisper prompts, and so on. For more information on workgroup prompts, see "Order of Workgroup Prompts" on page 7-14 and "Setting Workgroup Options" on page 10-5.
Quality Recording	Allows the company to record interactions. For more information on recording, see "Configuring Controls and Restrictions for an Agent" on page 8-7.
Limit Call Recording Percentage (33%)	Companies can allow Oracle Contact On Demand to randomly record agent interactions automatically. This feature sets the recording to occur for a specified percentage of all interactions. The default setting for this feature is 33%. If you want to set it to 100%, you must manually revise this setting.
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.
SQL Queries in Project Menus	Companies can run SQL statements against any SQL Server or Oracle database to retrieve or update data. For more information on SQL Queries, see "Creating SQL Query Menus" on page 11-17.
Proxies	Proxy servers perform all of the data requesting, so each workstation must be configured to make all internet requests from the proxy server and not the internet. For more information on proxies, see "About Setting the Proxy Information" on page 4-3.
Datasources	Companies can customize the Contact record that Oracle Contact On Demand uses to identify the contact data structure and location. Data sources work with the display template feature, which lets administrators change how to display contact data to agents and supervisors. For more information on data sources, see "Adding or Editing a Data Source Library" on page 6-33.
Graphic/Chart Reports	Represents the charts present in standard reports. For more information Supervision Manager views, see <i>Oracle Contact On Demand Supervision Manager Guide</i> .
Billing Report	The Service Billing Report By Project Report shows transaction times and billing rates by project for a specified date range. For more information on service billing by project, see "Service Billing Report by Project" on page 21-30.
Hired Date	Option to include the hired date entry for the user definition.

Examples of Possible Feature Sets

You can create separate company packages by including or limiting the various feature sets. [Table 5–2](#) shows four types of example company packages, and the feature set that each includes.

Table 5–2 provides an example feature set for the initial setup of a company. You must manually set up other features, if required. For more information on company packages, see "[About Company Packages](#)" on page 5-1.

Table 5–2 Example Company Packages and Their Feature Sets

Feature Sets	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
CRMOD Enabled	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
Preview	Yes	No	Yes	No
Proxies	No	No	No	Yes
Quality Recording	Yes	No	No	Yes
Simple CRM - Contacts	Yes	Yes	Yes	Yes
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

The company package is assigned to the company to enable the feature sets available for the company. You can assign packages to a company by using the wizard feature, or you can assign the package manually. When you create a company package, the package creates its own library of specific feature sets.

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

This task is a step in the ["Roadmap for Configuring the Integration between Oracle Contact On Demand and Oracle CRM On Demand"](#) on page F-13.

To create a company package

1. Log in as a network administrator.

For more information on logging in to Administration Manager, see ["Starting Administration Manager and Logging In"](#) on page 4-2.

2. When the Company List screen (or the Company Profile screen) appears, click Package Creator.

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 fields, type a name and description for this new package.

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

5. Choose 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 then click OK. For more information on the definitions provided, see in ["Full Feature Company Package for Oracle Contact On Demand"](#) on page 5-2.

Note: When you enable or disable a feature, you are adding or removing Oracle Contact On Demand system capabilities.

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

Later, when you create the company using the Company Configuration tab, you will select the company package from a list. For more information on company packages, see ["Adding or Removing Company Configuration Features"](#) on page 5-23.

Finding a Company Package

To determine which features are enabled or disabled for a company, find 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 in the Find a Package field.

Note: You cannot use a wildcard character.

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 Oracle Contact On Demand features.

Caution: You will not be able to delete a package if a company is using it. You must first remove the assignment of the package from all companies within the company configuration.

To edit a company package

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

The Add Company Package screen appears.

2. Select the box next to each feature to add it.

Features without check marks are not included.

3. Click OK.

The package changes to include only the features you selected.

Note: Agents, supervisors, and anyone already logged in to Oracle Contact On Demand must log out and log in again before they will see the changes.

Deleting a Company Package

You can 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.

Creating or Editing a Company

You can create a new company using two methods:

- ["Creating a New Company Using the Company Creation Wizard"](#) on page 5-8
- ["Configuring a New Company"](#) on page 5-13

This task is a step in the ["Roadmap for Setting Up Your Contact Center in Administration Manager"](#) on page 4-1.

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. When you create a new company, you must create the default System Administrator and NetAdmin passwords. You can accomplish creating these passwords in the Wizard or manually.

Note: Use the Company Creation Wizard to create the initial setup of a company. You must manually set up other features, if required. All the required fields are marked with an asterisk. You can still create a company manually by following the instructions provided in ["Configuring a New Company"](#) on page 5-13. For more information on company packages, see ["About Company Packages"](#) on page 5-1.

To create a new company using the Company Creation Wizard

1. Click Configuration, and then Companies List.
2. From the List of Companies screen, click Wizard.

Tip: If you are in another area, such as Package Creation, select Companies List option from the NetAdmin menu.

The New Company screen opens in the Profile area.

3. Complete any missing information in the applicable fields.

The following table describes some of the 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. Oracle Contact On Demand uses this alias to differentiate companies in the database, so you must provide a unique alias for each company.
Display Name	(Required) Type the name to display for this company on the Oracle Contact On Demand Company List screen. The display name does not appear elsewhere in Oracle Contact On Demand or in any of the reports. Note: The display name only displays when logging in as Netadmin. 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 find the company from the Company List.
System Administrator	Enter a password for <i>sysadmin</i> username.
Administrator	Enter a password for <i>admin</i> username.
Statistics	Active user limit statistics are categorized as provisioned and active types for agents, supervisors, and administrators. Note: The provisioned and active totals for Administrators excludes NetAdmin and SysAdmin accounts.

Field	Description
Active User Limit	The number defined for the company in the Licensing tab. For more information on defining the active user limit threshold, see " Adding or Editing User Accounts " on page 8-3. Note: If you set the number of active agents in excess of the allowable amount, the following error message appears: Active users currently exceed this number. Please revise active agents or increase the active user limit.
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 list, choose the country where the company for which you are providing services is located.
ZIP Code	Type the ZIP 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.
Inactive Session Timeout: Disable Session Timeout	This option will disable the session timeout for the client applications.
Inactive Session Timeout: Enable Session Timeout	This value is the period when Oracle Contact On Demand automatically logs out a user after inactivity. Choose a timeout value between 5 minutes and 24 hours. You can enter a time for the entire company. If you change the session timeout at the company level, Administration Manager requests whether you want to apply the change to all users (agents, supervisors, and administrators): <ul style="list-style-type: none"> ■ If you apply the change to all users, Oracle Contact On Demand changes the session timeout for all users to the new company value. This change applies only to agents and supervisors. It does not affect administrators. ■ If you do not apply the change to all users, existing users keep F current, session-timeout value. New users 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.

4. Click Next.

The screen changes to show Contact information.

5. Make sure the company contact fields have enough information to contact the person in charge of the contact center at the customer's site.

6. Click Next.

The screen changes to show a list of existing packages. (Each package identifies a specific contact center feature set.) For more information on company packages, see "[About Company Packages](#)" on page 5-1.

7. Choose the package containing the feature set for this company, and then click Next.

The screen changes to show Licensing information.

8. Complete any fields that might be missing information.

The following table describes some of the fields.

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	<p>Leave this box unchecked to indicate when to count all interactions when calculating the total for the Maximum Number of Simultaneous Interactions Permitted for this Company field. For example, if the Maximum Number of Simultaneous Interactions Permitted for this Company field value is 400, then Oracle Contact On Demand allows the company a total of 400 interactions of any kind at the same time.</p> <p>Select this box to give the company unlimited non-call interactions while still setting a limit on the call interactions.</p> <p>The company can have as many fax, voice mail, 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 or outbound).</p>
Interaction Limitations	<p>(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 Oracle Contact On Demand licenses.</p> <p>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 and ACD fax), and Chat.</p> <p>Note: You must assign at least one interaction to a media type.</p>
Maximum Number of Active Users	<p>For each company, enter the maximum number of concurrent active users (administration, supervisor, and agent).</p> <p>Note: If the number of current active users exceeds the number entered, Oracle Contact On Demand will generate the following error message, Active users currently exceed this number. Please revise active agents or increase the active user limit.</p>
Maximum Number of Logged In Users	<p>Type the maximum number of agents that the company can have logged in to Oracle Contact On Demand at the same time.</p> <p>Note: Supervisors are agent type users and can receive interactions, therefore the overall agent restriction includes supervisors.</p>
Maximum Number of Logged In Supervisors	<p>Type the maximum number of supervisors that the company can have logged in to Oracle Contact On Demand at the same time.</p> <p>Note: If an administrator logs in to Supervision Manager, the administrator is recognized as a supervisor and thus included in the count of supervisors.</p>

9. Click Next.

The screen changes to show the Regional Settings information.

10. Complete the applicable fields.

The following table describes some of the fields.

Field	Description
Date Format	<p>From the list, select a date format for the company.</p> <p>Note: Oracle Contact On Demand uses the selected format when displaying dates for all of the client applications, unless users override the company settings for their configuration.</p>
Time Zone	<p>From the list, select a time zone for the company.</p> <p>Note: The company time zone appears on all client applications for the company (agent, supervisor, and administrator), unless users override the company settings from their configuration.</p>
Select a Language	<p>This is the default language for the company. From the list, select the language for the internal messages. Internal messages can be:</p> <ul style="list-style-type: none"> ■ Email alarms from the server ■ The default language selected for reports <p>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.</p>

11. Click Next.

The screen changes to show the Business Hours information.

12. Do the following:

- Under Opening Days, check each day when the company is open for business and when agents are available to handle Web callback requests.
- For each day you check, select the time (hours and minutes) that the company opens on that day from the Opening Hours From list. Or, select 24 Hours if the contact center is always available for handling chat and Web callback interactions.
- Identify the time (hours and minutes) that the company closes on each day from the To list.

Note: 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 computer hosting your Oracle Contact On Demand installation.

13. Click Next.

The screen changes to show the Email Configuration options.

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

14. Complete the Email Configuration - General Addresses fields.

The following table describes some of the fields.

Field	Description
Voice Mail address	Type the email address to use as the return address on emails sent to agents, which contain voice mail attachments. So, if a problem occurs delivering an email containing a voice mail attachment to the agent, Oracle Contact On Demand 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 a problem occurs delivering an email containing a fax attachment to the agent, Oracle Contact On Demand sends the email and attachment to this address.
Alarm notification to Supervisor	<p>If an email error occurs, Oracle Contact On Demand sends an alarm notification to this address. This might happen when:</p> <ul style="list-style-type: none"> ■ 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. (Oracle Contact On Demand forwards the email to the alarm address.) ■ The Company Storage Email Address changed. If the storage changes, Oracle Contact On Demand 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 Oracle Contact On Demand server could not connect to the project's Inbound Email Server. ■ Emails were routed to a project and then the project was deleted. In this case, all of the emails for this project are forwarded to the alarm address. ■ The agent did not answer an email in time. ■ The project mailbox received an email from an invalid email address. Oracle Contact On Demand forwards these emails to the alarm mailbox. ■ The project received an invalid email from an agent, for example: <ul style="list-style-type: none"> The agent's email address was invalid. The agent responded to an interaction that was already answered.

15. Click Next.

The screen changes to show ANI (automatic number identification) information. For more information on ANI configuration, see ["Adding or Editing an ANI Library"](#) on page 6-29.

16. Do the following:

- To add additional information, click the Plus icon.
A new row opens.
- Type the new ANI number and description in the respective fields.

17. 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.

For more information on enabling SIP billing, see ["Enabling SIP Billing"](#) on page 5-17.

18. 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.

19. Click Next.

The Finish screen opens to display a Create Company button.

20. Click Create Company and wait.

The List of Companies screen reappears, displaying your new company's name and information in the list.

Configuring a New Company

You can also manually configure a new company.

To manually configure a new company

1. Log in to Administration Manager.

For more information on logging in to Administration Manager, see ["Starting Administration Manager and Logging In"](#) on page 4-2.

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 then click OK to create the new company.

Process of Managing Company Information

After selecting a company, use the tabs from the Options, Company selection to manage the company definition. You can perform the following tasks using the Company tabs:

- ["Adding, Editing, and Viewing Company Contact Information"](#) on page 5-14
- ["Configuring Company Language, Time Zone and Date Format"](#) on page 5-14
- ["Setting Company Business Hours"](#) on page 5-15
- ["Providing Custom Web Applications Access to Company Database Tables"](#) on page 5-15
- ["Enabling SIP Billing"](#) on page 5-17
- ["Integrating CRM with the Internet or a Win32 Application"](#) on page 5-17
- ["Configuring the Applet Console"](#) on page 5-20
- ["Adding or Removing Company Configuration Features"](#) on page 5-23
- ["Changing the Login Policy"](#) on page 5-25

- ["Restoring a User's Access After a Lockout"](#) on page 5-26
- ["Completing the LDAP Authentication Policy"](#) on page 5-26
- ["Handling Failures of Test LDAP Connection"](#) on page 5-27
- ["Adding Agents When Using LDAP Authentication"](#) on page 5-27
- ["Controlling Company Licensing"](#) on page 5-28
- ["Storing Voice Mails \(Unified Messaging\)"](#) on page 5-29
- ["Enabling Web Services"](#) on page 5-29

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).

This task is a step in ["Process of Managing Company Information"](#) on page 5-13.

To edit company contact information

1. Click Options, then Company, and click 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 then click Apply.

Configuring Company Language, Time Zone and Date Format

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

This task is a step in ["Process of Managing Company Information"](#) on page 5-13.

To configure company time zone and date format

1. Click Options, Company, and then the Regional Settings tab.
2. Complete the Regional Settings information, and then click OK.

The following table describes some of the fields.

Field	Description
Date Format	<p>From the list, select a date format for the company.</p> <p>Oracle Contact On Demand uses the selected date format when displaying dates on all user workstations for the company (agent, supervisor, and administrator), unless users override the company settings from their workstations.</p>
Time Zone	<p>From the list, select a time zone for the company.</p> <p>The company time zone appears on all user workstations for the company (agent, supervisor, and administrator), unless users override the company settings from their workstations.</p>
Select Language	<p>From the list, select the language for the internal messages used by the company. The internal messages can be:</p> <ul style="list-style-type: none"> ■ Email alarms from the server. ■ The default language selected for reports. <p>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.</p>

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 non-business hours, Oracle Contact On Demand 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.

This task is a step in "[Process of Managing Company Information](#)" on page 5-13.

To set company business hours

1. Click Options, Company, and then the Business Hours tab.
2. Under Opening Days, add a check mark to each day when the company is open for business and when agents are available to handle chat and Web callback requests.
3. For each day you check, specify the time (hours and minutes) that the company opens on that day from the Opening Hours 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 list, and then click OK.

Providing Custom Web Applications Access to Company Database Tables

Oracle Contact On Demand 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 Oracle Contact On Demand database for synchronization.

Note: You must log in as a network administrator for the Remote Database Configuration tab to be available.

This task is a step in "[Process of Managing Company Information](#)" on page 5-13.

To provide custom Web applications access to company database tables

1. Log in as a network administrator.
2. Click Options, Company, and then the Remote Data Storage tab.
3. On the Remote Database subtab, select the Enable Remote DB box to display additional fields.
4. Complete the Remote Database Configuration fields, and then click OK.

The following table describes some of the fields.

Table	Description
Enable Remote DB	Select this box to enable a remote database. Additional fields appear after you make this selection.
URL	(Required) The URL of the Oracle Contact On Demand Web Server.

Table	Description
Username	Type a user name and password to create a special account, used solely for giving a client application limited access to the Oracle Contact On Demand database. Note: This user cannot log in to Oracle Contact On Demand and does not appear in any reports.
Password	Type the password for the client application to use to access the Oracle Contact On Demand database.
Client History	Select to allow synchronization of the client history table.
Quality Control	Select to allow synchronization of the quality controls table.
Users	Select to allow synchronization of the users table.
Projects	Select to allow synchronization of these tables: <ul style="list-style-type: none"> ■ projects ■ projectschat ■ projectsemail ■ projectsphone ■ projectswebcallback
Workgroups	Select to allow synchronization of these tables: <ul style="list-style-type: none"> ■ workgroups ■ userworkgroup tables.
Interactions History	Select to allow synchronization of these tables: <ul style="list-style-type: none"> ■ interactions ■ historyactions ■ historycontactinformation ■ historyoutcome ■ historyautomatictemplate ■ historyroutingevents ■ historyroutingproject ■ historyroutingtransfer ■ historyroutinguser ■ historyroutingworkgroup
User Stats	Select to allow synchronization of the userstats table.
Workgroup Stats	Select to allow synchronization of the workgroupstats table.
Project Stats	Select to allow synchronization of the projectstats table.
User Status Duration	Select to allow synchronization of the userstatusduration table.
User Login	Select to allow synchronization of the userlogin table.

5. On the Recordings subtab, select the Enable Remote Storage of Quality and Transaction Recordings box to display additional fields.
6. Supply the following information in the provided fields, and then click OK:
 - File Server Location
 - Remote Directory

- Username
- Password

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.

This task is a step in "[Process of Managing Company Information](#)" on page 5-13.

To enable SIP billing

1. Click 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 box, and then enter a specific ANI.

Oracle Contact On Demand looks for this ANI on all agent call logs for all company agents. So, when a direct or internal call associated with this ANI occurs, and the agent is logged in to Oracle Contact On Demand, the cost of the call will not be included in SIP billing. If, however, the agent is not logged in to Oracle Contact On Demand, and the call is answered, the cost will be included in the SIP billing.

Note: Only a network administrator can define OnNet calls.

ACD calls, however, will not ring through unless the agent is logged in to Oracle Contact On Demand.

4. Click OK.

Integrating CRM with the Internet or a Win32 Application

For your company to invoke a Web page or Win32 application, Oracle Contact On Demand 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 Interaction Manager where Oracle Contact On Demand will load the Web page, or identify the external application that will start on the agent's computer. For more information on parameters that are passed to external applications, see [Appendix E, "Parameters Passed to External Applications."](#)

The CRM Integration tab has three subtabs:

- **Custom Tab.** Used for creating a custom tab in Interaction Manager, and then loading a unique Web page into that Custom tab.

- **External Application Tab.** Used for starting a separate browser on the agent's computer. When the browser is started, it loads a unique Web page, and then starts a Win32 application on the agent's computer.
- **CRMOD Tab.** Used for define a base URL for a company from Oracle Contact On Demand to Oracle CRM On Demand.

This task is a step in "Process of Managing Company Information" on page 5-13 and in "Roadmap for Configuring the Integration between Oracle Contact On Demand and Oracle CRM On Demand" on page F-13.

To integrate CRM with the Internet or a Win32 application

1. From Administration Manager, click Options, Company, and then CRM Integration.
2. Select the appropriate tab for integrating CRM with the Internet or a Win32 executable application.
3. Complete the fields as described for each tab.

Configuring a Custom Tab

To have your custom tab appear in the agent's Interaction Manager screen, complete the steps outlined in this task.

To configure a Custom tab

1. Click Options, Company, CRM Integration, and then Custom tab.
2. Complete the fields as described for the Custom tab, and then click OK.

The following table describes the fields and options.

Field	Description
Enable Custom tab in Interaction Manager	Select this option so that your custom tab will appear in Interaction Manager. 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 Interaction Manager 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 Interaction Manager.
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: Oracle Contact On Demand supports any protocol that the browser supports (http, https, FTP, and so on). If the URL string does not contain a protocol, Interaction Manager automatically adds http:// as a default prefix, upon receiving the URL. In addition, because Interaction Manager adds a default prefix, the string does not appear in Administration Manager.

Field	Description
Run Application	<p>These radio buttons let you choose when your HTML file loads into the custom tab in Interaction Manager:</p> <ul style="list-style-type: none"> ▪ Every time a new interaction is received. When Interaction Manager offers an interaction to an agent, it loads the HTML file into the custom tab. ▪ When a new interaction is accepted. When the agent clicks the Accept Interaction button in Interaction Manager, it loads the HTML file into the custom tab. Furthermore, Interaction Manager 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 Interaction Manager, it loads the HTML file into the custom tab. Furthermore, Interaction Manager 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, Interaction Manager loads the HTML file into the custom tab. Furthermore, when it 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.

Configuring the External Application Tab

To allow agents to open an external application or another Web page from the Interaction Manager screen, complete the steps outlined in this task.

To configure the External Application tab

1. Click Options, Company, CRM Integration, and then External Application.
2. Complete the fields as described for enabling an external application, and then click OK.

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

The following table describes the fields and options.

Field	Description
Enable external application to invoke from Interaction Manager	<p>Note: If you are loading an executable the executable must already be installed on the agent's computer.</p> <p>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).</p>
Application to invoke	<p>If you are loading an HTML page, type the full path to the page.</p> <p>Configure a custom tab in Interaction Manager to load an HTML page in one of two ways:</p> <ul style="list-style-type: none"> ▪ Use the Company, CRM Integration, Custom Tab, so that Interaction Manager loads the HTML page into a frame at the bottom of the custom tab. ▪ Use the Company, CRM Integration, External Application Tab so that Interaction Manager will display a browser process and load the HTML page. You can also choose whether the browser process is modal or non-modal. (For more information, see the Application Type field.)

Field	Description
Application Type	<p>From this menu, select one or of the following options:</p> <ul style="list-style-type: none"> ▪ HTML Modal. Use this option to control the display of HTML modal windows. The external browser remains in focus (foreground) until the agent closes the browser window. The URL that you define in the Invoke field determines the HTML page that displays. ▪ HTML Window. Use this option to allow the agent to keep the external browser window in the background. The agent can use a mouse (or Alt-tab) to toggle between the external browser window and Interaction Manager. The URL that you define in the Invoke field determines the HTML page that will display. ▪ Win32 Window. If you want Interaction Manager to start the executable file, select this setting and enter the path for the executable file in the Invoke field.
Run Application	<p>The following options let you choose when Interaction Manager loads the HTML file or executable into the custom tab:</p> <ul style="list-style-type: none"> ▪ Every time a new interaction is received. When Interaction Manager offers an interaction to an agent, it 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 Interaction Manager, it loads the HTML file or executable into the custom tab. Furthermore, Interaction Manager 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 Interaction Manager, it loads the HTML file or executable into the custom tab. Furthermore, Interaction Manager 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, Interaction Manager loads the HTML file or executable into the custom tab. Furthermore, when Interaction Manager 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.

Defining a Base URL for a Company

To define a base URL for a company from Oracle Contact On Demand to Oracle CRM On Demand, complete the steps outlined in this task.

To define a base URL for a company

1. Click Options, Company, CRM Integration, and then CRMOD.
2. In the CRM On Demand URL field, enter the full path of the base URL for the company, and then click OK.

Configuring the Applet Console

The Applet Console Configuration tab contains configuration settings. The configuration settings in can also be helpful in troubleshooting. You can use these settings at the company level, or for individual agents.

Note: This tab is available only to network administrators. The only feature from this tab that is applicable to the new Oracle Contact On Demand client (Agent and Supervisor) is the Select JRE Download Version.

This task is a step in "[Process of Managing Company Information](#)" on page 5-13.

To configure the applet console

1. Select Options, Company, and then the Applet Console Configuration tab.
2. Perform one of the following:
 - For company level settings, navigate to Options, and then Company.
 - For agent level settings, navigate to Options, and then Agents.
3. Select the company or the agent for whom you want to configure the applet console.
4. Select the Applet Console Configuration tab.
5. Complete the fields in the Applet Console Configuration window.

The following table describes some of the fields.

Field	Description
Close Connection	<p>Oracle Contact On Demand (Administration Manager, Interaction Manager, Supervision Manager, and so on) occasionally connect to the Oracle Contact On Demand Web Server to determine if there are any messages (interactions, statistics updates, and so on). This option has the following effects:</p> <ul style="list-style-type: none"> ■ If the Close Connection option is not checked, Oracle Contact On Demand will continue to use the same HTTP connection to the Web Server indefinitely. ■ If this option is checked, the connection will reestablish every 60 requests.
Disable Agent's Cache	<p>When an agent logs in to Interaction Manager, or a supervisor logs in to Supervision Manager, Oracle Contact On Demand downloads information (about status, workgroups, users, URLs, outcomes, and so on) from the database so that it appears in Oracle Contact On Demand.</p> <p>While the user is logged in, this information is in memory. However, when the user logs out, Oracle Contact On Demand writes all the data to the temporary files on the user's hard drive.</p> <p>Oracle Contact On Demand saves the temporary files, so that the next time the user logs in, Oracle Contact On Demand downloads only new or changed information (like a new project or outcome, or a deleted or edited item) rather than downloading all the data.</p> <p>When you select this box, Oracle Contact On Demand downloads all information that Oracle Contact On Demand requires (from the database) each time that the user logs in.</p> <p>Note: This data can consume a large amount of resources on both the server and the user's computer.</p>

Field	Description
Debug Level	<p>From the list, select the level of debug information that you want to generate. You can view the debug information from a file or the Java Console. Select from the following:</p> <ul style="list-style-type: none"> ▪ Off. Does not generate any debug information. ▪ Debug. Generates most debugging information about Oracle Contact On Demand. ▪ Info. Generates minimal debug information. ▪ Error. Generates only error information. ▪ Fatal. Generates only information about fatal errors. ▪ All. Generates all debug and error information. <p>Note: If you choose to send the information to the Java Console, the All option will consume most of your memory and CPU.</p> <p>Note: The debug level applies only to the legacy client.</p>
Time to Login (in minutes)	<p>From the list, select the time that Interaction Manager will wait before downloading all the required information from the database and logging in to the Interaction Manager Server. So, if the login takes more than this time, Interaction Manager automatically logs out.</p>
Enable Log File	<p>Select this option to write debug information to a file. You must also enter a log file path and the path must include the filename.</p> <p>Oracle Contact On Demand creates folders if they do not exist. It writes a debug file to this path on every agent's computer.</p> <p>Note: This field applies only to the legacy client.</p>
Ping Delay in Seconds	<p>Oracle Contact On Demand (Administration Manager, Interaction Manager, Supervision Manager, and so on) occasionally connect to the Oracle Contact On Demand Web Server to determine if there are any messages (interactions, statistics updates, and so on).</p> <p>The Ping Delay in Seconds is the time that Oracle Contact On Demand waits before sending the next request to the Web Server.</p>
Disable Wrap Up Timer	<p>If checked, the wrap-up timer does not appear to the agents in Interaction Manager. (This option prevents flicker on some screens.)</p>
Disable Elapsed Timer	<p>If checked, the interaction timer does not appear to the agents in Interaction Manager. (This option prevents flicker on some screens.)</p>
Disable Phone State Timer	<p>This is the animated phone icon that appears in the Interaction Manager Information Bar. If checked, the agent will not see the animated icon. The agent will always see the on-hook icon. (This option can prevent flicker on some screens.)</p>
URL Timeout (in Seconds)	<p>From the list, select the time that Oracle Contact On Demand will wait for a response from the Web Server before ending the connection and resending the request.</p>
Enable Hot Keys	<p>Select this box to enable keyboard shortcuts in Oracle Contact On Demand.</p> <p>If unchecked, the keyboard shortcuts will not be available. Access to third-party application keyboard shortcuts are unaffected.</p>

Field	Description
Select JRE Download Version	<p>Select the JRE (Java Runtime Environment) version from the list.</p> <p>This setting is the minimum version that the agent needs to have installed on their computer, otherwise it will be automatically be downloaded. If a higher supported version is installed on the agent's computer, the higher version will run. This is a default setting for the company and can be over written at the agent level.</p> <p>Note: Various versions of JRE 1.5 and 1.6 are supported by default. This setting affects the version that is downloaded when the user attempts to start without a supported version. For more information on the supported JRE versions, see the Compatibility Matrix in the <i>Oracle Contact On Demand Release Notes</i> on My Oracle Support.</p>

6. After changing the setting for any of the options, click OK.

A message window appears with 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.

- 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.

For the Select JRE Download Version field, this option changes the setting for all existing agents. If you later add an agent, that new agent is associated with the prior JRE version in the Select JRE Download Version field.

7. Select one of the options, and then click OK.

Adding or Removing Company Configuration Features

The Company Configuration tab allows you to add or remove features. These features include allowing outbound calls, enabling the Stop All Recording functionality of Interaction Manager, 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 available.

This task is a step in "[Process of Managing Company Information](#)" on page 5-13.

To add or remove company configuration features

1. Click Options, Company, and then the Company Configuration tab.
2. Complete the fields.

The following table describes the fields.

Field	Description
Allow Outbound Calls	<p>From the list, select one of the following outbound call options:</p> <ul style="list-style-type: none"> ■ 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. <p>Note: As soon as you apply a change, Oracle Contact On Demand dynamically updates both Supervision Manager and Interaction Manager immediately.</p>
Enable Stop All Recording Functionality of Interaction Manager	<p>This option allows the Oracle Contact On Demand agent to initiate the Stop All Recording feature for an interaction. When invoked, Oracle Contact On Demand will disable the ability to record the particular interaction. This affects Quality Recording and Transaction Recording in progress or attempted to be initiated for the duration of the interactions.</p>
Allow Recording without Contact Assignment	<p>Allows Oracle Contact On Demand to record the interaction when no customer contact has been designated.</p>
Range of Extensions for Company	<p>In the Start box, type the starting number for company phone extensions.</p> <p>In the End box, type the ending number for company phone extensions.</p> <p>Note: Extension numbers cannot begin with zero or nine, must contain a minimum of three numbers, and contain a maximum of five numbers.</p>
Auto Set Agent Extension	<p>Select this option so that Oracle Contact On Demand automatically assigns an extension to each agent.</p>
Company Package	<p>From the list, select the company package, which identifies each contact center feature set for this company. For more about company packages, see "About Company Packages" on page 5-1.</p>
Languages Library	<p>The languages library you select determines the languages available for Oracle Contact On Demand and the order in which they appear.</p> <p>Note: The NetAdmin must define the libraries, or the default selection contains all languages and countries.</p>
Countries Library	<p>The countries library you select determines the countries available for Oracle Contact On Demand and the order in which they appear.</p> <p>Note: The NetAdmin must define the libraries, or the default selection contains all languages and countries.</p>

3. Click OK.

If you made changes, a message window 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.
- 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 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 Administration Manager, Interaction Manager, and Supervision Manager, or to authenticate Oracle Contact On Demand users on an already configured LDAP server. You can also restore a user's access after a permanent lock out. For more information, see "[Restoring a User's Access After a Lockout](#)" on page 5-26.

Note: By default, newly created users are assigned a status of *inactive*.

This task is a step in "[Process of Managing Company Information](#)" on page 5-13.

To change the Login Policy

1. Click Options, Company, and then the Login Policy tab.
2. Make your selections, and then click OK.

The following table describes some of the selections.

Field	Description
Select Login Policy	<p>From the list, select a login policy from:</p> <ul style="list-style-type: none"> ■ Select the Default Login option to enforce some password control over anyone who logs in to Administration Manager, Interaction Manager, and Supervision Manager. (For example, the password required length, required characters, lockout policy, and so on.) ■ Select the LDAP Authentication option to authenticate Oracle Contact On Demand users on an already configured LDAP Server. When you select this box, different fields appear. For more information on LDAP authentication, see "Completing the LDAP Authentication Policy" on page 5-26.
Password must include at least the following	<p>Specify all of the following:</p> <ul style="list-style-type: none"> ■ 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	<p>From the list, select a minimum password length forcing Oracle Contact On Demand users to create a password that meets the minimum password length.</p>

Field	Description
Number of login attempts before locking the account	From the 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 Oracle Contact On Demand unlocks the user's account depends on which locking option you select in the next options.
Lock User Account for [] Minutes	Check this option and, from the 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 Oracle Contact On Demand until you unlock the account.
Never Lock the User Account	Check this option so that no limit will be set 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 Oracle Contact On Demand deactivates a user's account if it remains inactive for the number of days you specify.

Restoring a User's Access After a Lockout

You can restore a user's access after the user's account has been locked out.

This task is a step in "[Process of Managing Company Information](#)" on page 5-13.

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

1. Click Options, Agent, select the agent who is locked out, and then click Edit.
2. At the Profile tab, change the Account to Active status.
3. Click Save.

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 box to identify the characteristics Oracle Contact On Demand will use to allow LDAP authentication. These characteristics include:

- The host name of the network computer running the LDAP Server
- The LDAP server port number
- The location where Oracle Contact On Demand 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 Oracle Contact On Demand, you must select the Test LDAP Connect button to verify that the connection works.

This task is a step in "[Process of Managing Company Information](#)" on page 5-13.

To complete the LDAP authentication policy

1. In the Login Policy tab, select the LDAP Authentication policy.

Different fields appear on the screen.

2. Complete the fields.

The following table describes the fields.

Field	Description
LDAP Server Hostname	Type the host name of the network computer 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 Oracle Contact On Demand users exist on the LDAP server.
LDAP Search User	<ul style="list-style-type: none"> ▪ User's DN. Type the distinguished name of the user that you created on the LDAP server to allow Oracle Contact On Demand applications to be authenticated by LDAP. ▪ Password. Type the password of the user that you created on the LDAP server to allow Oracle Contact On Demand applications to be authenticated by LDAP.
Test LDAP Connection (button)	Click this button so that Administration Manager tests the connection to your LDAP server using the information you provided. For more information on test failures, see " Handling Failures of Test LDAP Connection " on page 5-27. Note: When using LDAP Authentication, before logging out, you must click this Test LDAP Connection button.

Handling Failures of Test LDAP Connection

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 Administration Manager after the test fails, Oracle Contact On Demand forces you to manually edit the database before you can log in to Administration Manager again.

This task is a step in "[Process of Managing Company Information](#)" on page 5-13.

Adding Agents When Using LDAP Authentication

For more information on how to add agents when you use LDAP authentication, see "[Password](#)" on page 5-16.

This task is a step in "[Process of Managing Company Information](#)" on page 5-13.

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 Oracle Contact On Demand users a company can have logged in
- The maximum number of logged in supervisors
- The maximum number of active users
- The enabling of Web services

For more information on how to enable Web services for custom applications, see ["Enabling Web Services"](#) on page 5-29.

- The number of active users

For more information on the active user threshold, see ["Adding or Editing User Accounts"](#) on page 8-3. For more information on setting user limits in the Company Creation Wizard, see ["Creating a New Company Using the Company Creation Wizard"](#) on page 5-8.

This task is a step in ["Process of Managing Company Information"](#) on page 5-13.

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. Complete the fields, and click OK.

The following table describes some of the fields.

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	<p>Leave this box unchecked. Oracle Contact On Demand will count all interactions when calculating the total for the Maximum Number of Simultaneous Interactions Permitted for this Company field. For example, if the Maximum Number of Simultaneous Interactions Permitted for this Company field value is 400, then Oracle Contact On Demand allows the company a total of 400 interactions of any kind at the same time.</p> <p>Select this box to give the company unlimited non-call interactions while still setting a limit on the call interactions. The company can have as many fax, voice mail, 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).</p>

Field	Description
Interaction Limitations (Online, Offline, and Chat)	<p>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 Oracle Contact On Demand licenses.</p> <p>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 and ACD fax), and chat.</p>
Maximum Number of Logged In Users	<p>Type the maximum number of agents the company can have logged in to Oracle Contact On Demand at the same time.</p> <p>Note: Supervisors are agent type users and can receive interactions, therefore the overall agent restriction includes supervisors.</p>
Maximum Number of Logged In Supervisors	<p>Type the maximum number of supervisors the company can have logged in to Oracle Contact On Demand at the same time.</p> <p>Note: If an administrator logs in to Supervision Manager, the administrator is recognized as a supervisor and thus included in the count of supervisors.</p>

Storing Voice Mails (Unified Messaging)

For fast access to voice mails and for more flexible functions, you can choose to store voice mail messages as .wav 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 voice mail.

This task is a step in "[Process of Managing Company Information](#)" on page 5-13.

To store voice mail messages as .wav 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. Choose how to store voice mails as the default option for the entire company from one of the following, and then click OK:
 - Click Mail Server to store voice mails on the network email server.
 - Click Internal Voicemail to store voice mails locally.

Enabling Web Services

From the Options, Company selection, use the Licensing tab to configure Web service usage and to define the license count and host URL for custom applications.

This task is a step in "[Process of Managing Company Information](#)" on page 5-13.

To enable web services

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. Complete the fields, and then click OK.

The following table describes some of the fields.

Field	Description
Enable WebServices Usage	Select this option for each company that you wish to allow Web service usage.
Maximum number of WebService Sessions	Type the maximum number of Web service sessions that can be run simultaneously for the company. Note: The maximum number of Web service sessions that you can enter must be consistent with the number of provisioned licenses.
Select WebService Host URL	Select the host URL from the list. For example, host.contactondemand.com. Note: The URL can be a load balancer or an individual host as it is the host that will be used for the Web services and company.

Finding a Company

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

To find a company

- 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 field, 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.

Sorting Columns of Information

You can sort columns of information to suit your needs.

To sort and manipulate information

- 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 scroll through the list, click the controls at the bottom of the company list.
- To limit the number of companies in the list, from the numeric list, select the maximum number of company definitions to display.

Additional Sort Methods

Use the information in [Table 5–3](#) for additional ways to manipulate the results of a sort.

Table 5-3 *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

Creating Oracle Contact On Demand Libraries

This chapter explains how to create libraries of resources, settings, or information for use by other parts of Oracle Contact On Demand. It includes the following topics:

- [About Libraries](#)
- [Database and Table Requirements](#)
- [About Web Server Requirements](#)
- [About Default Display Templates Library](#)
- [Installing the Supported Configurations](#)
- [About Contact Templates](#)
- [How Oracle Contact On Demand Uses Intelligent Templates to Calculate Scores](#)
- [About Creating and Deleting Libraries](#)
- [About the Business Events Library](#)
- [About the Outcome Library and Using Interaction Outcomes](#)
- [Creating an CRMOD Integration Library](#)

About Libraries

Libraries represent resources within your company or departments. An example of a resource is an Inbound Email Server. Libraries can also consist of configuration settings (such as prefix routing patterns, or interaction handling). Additionally, libraries can consist of information that is used for custom statuses or faxes. Other parts of Oracle Contact On Demand use the libraries that you create in the same way that they use information about your agents, workgroups, and projects.

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
- Oracle Contact On Demand 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 Web Server requirements follow:

- Your Web Server must be able to configure a pool of connections on the Web Server (IIS, and so on). The configuration information 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.

For more information on Web Server requirements, see *Oracle Contact On Demand Installation and Upgrade Guide*.

About Default Display Templates Library

You can customize the way supervisors and agents view, add, and edit contact information by creating customized display templates.

Administration Manager 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 Oracle Contact On Demand database. You can customize the storage of your contact records by using data sources. For more information on data sources, see "[Types of Customization](#)" on page 6-2.
- **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 window in Interaction Manager. 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 window in Interaction Manager. You cannot create new Transfer Templates.

Note: You can modify all three templates. However, you cannot create a new system transfer template.

Types of Customization

[Table 6-1](#) provides an overview of the six main configuration options for customizing contact record storage.

Table 6–1 Ways to Customize Contact Record Storage

Configuration Option	Description
Configuration 1	<p>In Configuration 1, you keep your contact records in the default table and use the default system contact template:</p> <ul style="list-style-type: none"> ■ Default system contact template ■ Default data source ■ Default contact table ■ Oracle Contact On Demand database ■ Oracle Contact On Demand Web Server <p>For more information on customizing contact record storage, see "Configuration 1: Preconfigured by Oracle Contact On Demand" on page 6-4.</p>
Configuration 2	<p>In Configuration 2, you keep your contact records in the default table and create a new contact template:</p> <ul style="list-style-type: none"> ■ Custom contact template (create) ■ Default data source ■ Default contact table ■ Oracle Contact On Demand database ■ Oracle Contact On Demand Web Server <p>For more information on customizing contact record storage, see "Configuration 2: Contact Records Stored in Contacts Database" on page 6-5.</p>
Configuration 3	<p>In Configuration 3, you keep your contact records in the default table, create a new contact template, and create a new data source:</p> <ul style="list-style-type: none"> ■ Custom contact template (create) ■ Custom data source (create) ■ Default contact table ■ Oracle Contact On Demand database ■ Oracle Contact On Demand Web Server <p>For more information on customizing contact record storage, see "Configuration 3: Contact Records Stored in Default Contact Table" on page 6-6.</p>
Configuration 4	<p>In Configuration 4, you keep your contact records in a new table that you create in the Oracle Contact On Demand database. You also create a new contact template and a new data source:</p> <ul style="list-style-type: none"> ■ Custom contact template (create) ■ Custom data source (create) ■ Custom contact table (create) ■ Oracle Contact On Demand database ■ Oracle Contact On Demand Web Server <p>For more information on customizing contact record storage, see "Configuration 4: Storing Your Contact Records" on page 6-8.</p>

Table 6–1 (Cont.) Ways to Customize Contact Record Storage

Configuration Option	Description
Configuration 5	<p>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:</p> <ul style="list-style-type: none"> ■ Custom contact template (create) ■ Custom data source (create) ■ Custom contact table (create) ■ Your database (instead of the Oracle Contact On Demand database) ■ Oracle Contact On Demand Web Server <p>For more information on customizing contact record storage, see "Configuration 5: Storing Same Contact Records" on page 6-10.</p>
Configuration 6	<p>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:</p> <ul style="list-style-type: none"> ■ Custom contact template (create) ■ Custom data source (create) ■ Custom contact table (create) ■ Your database (instead of the Oracle Contact On Demand database) ■ Your Web Server (instead of the Oracle Contact On Demand Web Server) <p>For more information on customizing contact record storage, see "Configuration 6: Storing Your Contact Records" on page 6-12.</p>

Installing the Supported Configurations

This topic describes how to install the following configuration options:

- ["Configuration 1: Preconfigured by Oracle Contact On Demand"](#) on page 6-4
- ["Configuration 2: Contact Records Stored in Contacts Database"](#) on page 6-5
- ["Configuration 3: Contact Records Stored in Default Contact Table"](#) on page 6-6
- ["Configuration 4: Storing Your Contact Records"](#) on page 6-8
- ["Configuration 5: Storing Same Contact Records"](#) on page 6-10
- ["Configuration 6: Storing Your Contact Records"](#) on page 6-12

Note: For more information on each option and an overview of each configuration, see [Table 6–1](#).

Configuration 1: Preconfigured by Oracle Contact On Demand

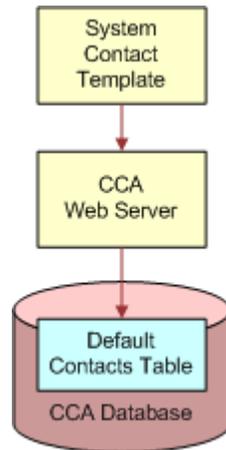
As [Figure 6–1, "Configuration 1: Preconfigured"](#) shows, in Configuration 1, the following are predefined by Oracle Contact On Demand:

- System contact template
- Web Server
- Database

- Contacts table

Note: In Configuration 1, you cannot delete the system contact template.

Figure 6–1 Configuration 1: Preconfigured



When agents and supervisors log in, they select the Oracle Contact On Demand 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 1 (Preconfigured)

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

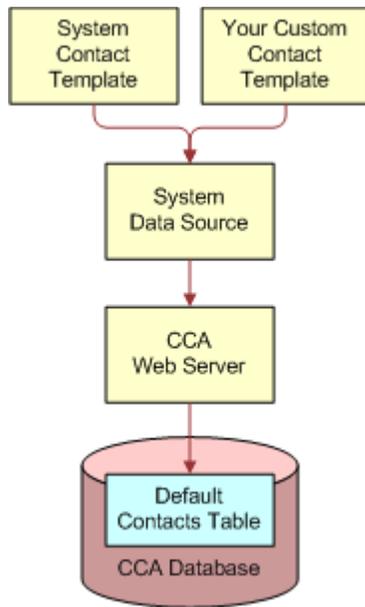
To install Configuration 1

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

Configuration 2: Contact Records Stored in Contacts Database

As [Figure 6–2, "Configuration 2: Contact Records Stored in Contacts DB"](#) shows, in Configuration 2:

- All contact records are stored in the default Contacts table.
- When agents and supervisors log in, they see the Oracle Contact On Demand Contact List and your Contact List (the name of your template). However, both lists are the same. For example, if there are 50 contact records in the Oracle Contact On Demand Contact List, the same 50 records will appear when the agent selects your Contact List.

Figure 6–2 Configuration 2: Contact Records Stored in Contacts DB

Installing Configuration 2

All contact records are stored in the default Contacts table.

To install Configuration 2

1. Create a new contact template.
 - For more information on templates, see "[About Default Display Templates Library](#)" on page 6-2.
2. Click Libraries, Display Templates, and then Add.
3. In the Add Display Templates screen:
 - In the Name tab, type a unique name and description for your contact template.
 - 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 then click OK to save your changes.

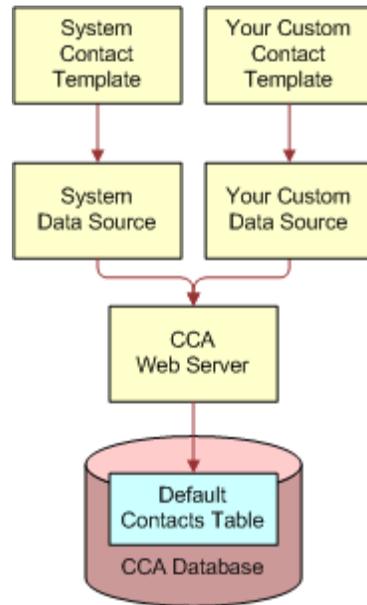
Configuration 3: Contact Records Stored in Default Contact Table

As [Figure 6–3, "Configuration 3: Contact Records Stored in Default Contact Table"](#) shows, in Configuration 3:

- All contact records are stored in the default Contacts table.
- When agents and supervisors log in, they see the Oracle Contact On Demand 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 there are 50 contact records in the Oracle Contact On Demand Contact List, none of them will 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.

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



Example of an Agent Using Two Contact Lists with Different Records

A new contact template called *US Contacts*, which uses a new data source is created. (The name of the data source does not matter in this example.)

An agent logs in to Interaction Manager, selects the Oracle Contact On Demand Contact List from the Contact Information list, and then 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 list. The agent then creates another three contact records: Evan Lewis, Steve Callard, and Joanne Ritchie.

Figure 6–4 The Default Contacts Table

Default Contacts Table				
	DataSourceID	FName	LName	Phone
Default System Data Source	0	Mike	Roberts	555-1212
	0	Susan	Dawson	555-1212
	0	Anthony	Anderson	555-1212
Your Custom Data Source	1	Evan	Lewis	555-1212
	1	Steve	Callard	555-1212
	1	Joanne	Ritchie	555-1212

Installing Configuration 3

Complete the steps in the following procedure to install Configuration 3.

To install Configuration 3

1. Create a new data source:
 - Click Libraries, Data Source, and then click Add.
The Add Data Source screen opens.
 - In the Name tab, type a unique name and description for the data source.
 - In the Data Source tab:
 - Under Data Format, click System Default.
 - Under Database Pool Name, click System Default.
 - Under URL, click System Default.
 - Click OK to save your changes.

2. Create a new contact template:

For more information on templates, see ["About Default Display Templates Library"](#) on page 6-2.

- Click Libraries, Display Templates, and then click Add.
The Add Display Templates screen opens.
- In the Name tab:
 - In the Label Name column, type a unique name for your new contact template.
 - From the Data Source list, select the name of the new data source that you created in Step 1.
- Click the Layout and List Header tabs, make any changes, and then click OK to save your changes.

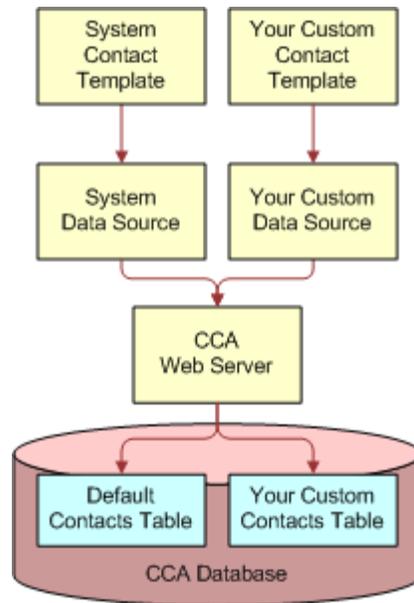
When an agent logs in, your new Custom Template is not selected by default. However, you can assign your new Custom Template to a project, so that when Oracle Contact On Demand routes a call to that project, it searches your new data source to try to make the contact assignment.

Configuration 4: Storing Your Contact Records

As [Figure 6-5, "Configuration 4: Storing Your Contact Records"](#) shows, in Configuration 4:

- You can store some or all of your contact records in the new table that you create in the Oracle Contact On Demand database.
- When the agents and supervisors log in, the Oracle Contact On Demand Contact List and your new Custom Contact List (the name of your new contact template) appear. However, both lists are different (compare Configuration 4 with Configuration 2). For example, if there are 50 contact records in the Oracle Contact On Demand Contact List, none of them will appear when the agent selects your new Custom Contact List.

Note: Agents and supervisors can see that system contact records are in one table, and your other contact records are in another table.

Figure 6–5 Configuration 4: Storing Your Contact Records

Installing Configuration 4

Complete the steps in the following procedure to install Configuration 4.

To install Configuration 4

1. Create your new custom table in the Oracle Contact On Demand database, and verify 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:
 - Click Libraries, Data Source, and then click Add.
The Add Data Source screen opens.
 - In the Name tab, type a unique name and description for the data source.
 - In the Data Source tab, under Data Format, select User Defined.
 - Click the Plus icon.
The column heading appears.
 - 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 in the Data Source screen that you want agents and supervisors to see when they log in to Oracle Contact On Demand. If you add a column that you do not want agents or supervisors to see, you can hide it later when you create your new custom contact template.

- Under Database Pool Name, click System Default.

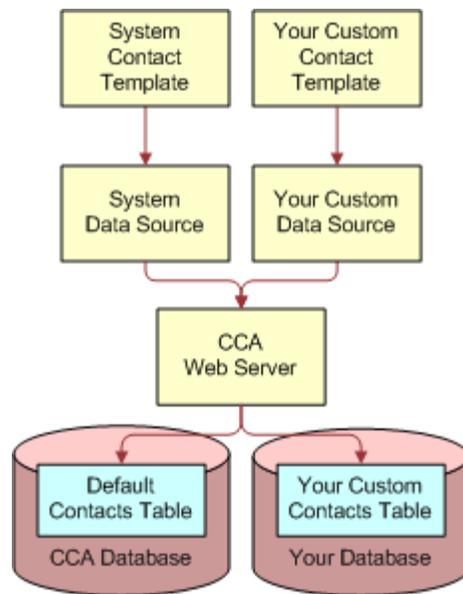
- Under URL, click System Default, and then click OK to save your changes.
3. Create a new contact template:
- For more information on templates, see ["About Default Display Templates Library"](#) on page 6-2.
- Click Libraries, Display Templates, and then click Add.
The Add Display Templates screen opens.
 - In the Name tab:
 - In the Label Name column, type a unique name for your contact template.
 - From the Data Source list, select the name of the data source that you created in Step 2.
 - Click the Layout and List Header tabs, make any changes, and then click OK to save your changes.
4. If required, assign your new template to a project.
- When an agent logs in, your new template is not selected by default. However, when Oracle Contact On Demand routes a call to that project, it searches your new data source in an attempt to make the contact assignment.

Configuration 5: Storing Same Contact Records

As [Figure 6-6, "Configuration 5: Storing Some Contact Records"](#) shows, 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 Oracle Contact On Demand 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 there are 50 contact records in the Oracle Contact On Demand Contact List, none of them will appear when the agent selects your new Custom Contact List.

Note: Agents and supervisors can see that the Oracle Contact On Demand contact records are in one database, and your other contact records are in another database.

Figure 6–6 Configuration 5: Storing Some Contact Records

Installing Configuration 5

Complete the steps in the following procedure to install Configuration 5:

To install Configuration 5

1. Verify that your new database supports JDBC.

For more information on the configuration requirements, see *Oracle Contact On Demand Installation and Upgrade Guide*.

2. Create a new Contact table in your database, and verify 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.
3. Create a new data source.
 - Click Libraries, Data Source, and then click Add.
The Add Data Source screen opens.
 - In the Name tab, type a unique name and description for the data source.
 - In the Data Source tab:
 - Under Data Format, click User Defined. A new box appears.
 - Click the Plus icon. The column headings appear.
 - 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 there is 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 agents 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, type the URL of your Web Server in the field, and then click OK to save your changes.
4. Create a new contact template:

For more information on templates, see "[Creating a New Contact Template](#)" on page 6-14.

- Click Libraries, Display Templates, and then click Add.
The Add Displays Templates screen opens.
 - In the Name tab:
 - In the Label Name column, type a unique name for your contact template.
 - From the Data Source list, select the name of the data source that you created in Step 3.
 - Click the Layout and List Header tabs, make any changes, and then click OK to save your changes.
5. If required, assign your new template to a project.

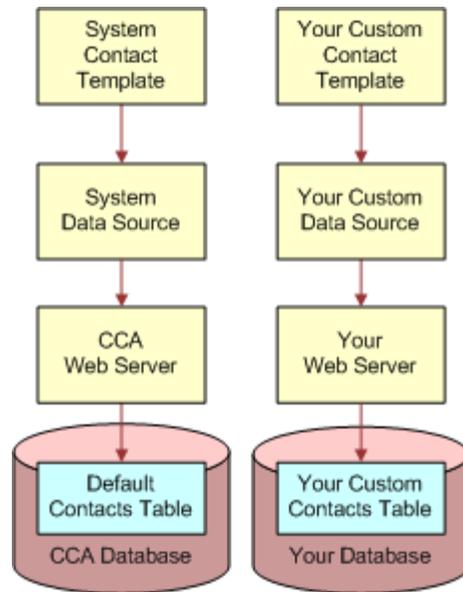
When an agent logs in, your new template is not selected by default. However, but when Oracle Contact On Demand routes a call to that project, it searches your new data source in an attempt to make the contact assignment.

Configuration 6: Storing Your Contact Records

As [Figure 6-7, "Configuration 6: Storing Your Contact Records"](#) shows, 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 Oracle Contact On Demand 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 there are 50 contact records in the Oracle Contact On Demand Contact List, none of them will appear when the agent selects your new Custom Contact List.

Note: Agents and supervisors can see that the Oracle Contact On Demand contact records are in one database, and your other contact records are in another database.

Figure 6–7 Configuration 6: Storing Your Contact Records

Installing Configuration 6

Complete the steps in the following procedure to install Configuration 6.

To install Configuration 6

1. Configure your Web Server:
 - Create a connection pool in your Web Server for your database.
 - Install the Oracle Contact On Demand Contact Component on your Web Server.
 - Verify that your Web Server has a JDBC driver that can connect to your database.

For more information on the configuration requirements, see *Oracle Contact On Demand Installation and Upgrade Guide*.
2. Verify that your new database supports JDBC.
3. Create a new Contact table in your database, and verify 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.
4. Create a new data source:
 - Click Libraries, Data Source, and then click Add.
The Add Data Source screen opens.
 - In the Name tab, type a unique name for the data source.
 - In the Data Source tab:
 - Under the Data Format, click User Defined. A new box appears.
 - Click the Plus icon. Row headings appear.

- 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 there is 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.

Note: If you do add a column, you can always hide it from agents 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:

For more information on templates, see "[Creating a New Contact Template](#)" on page 6-14.

- Click Libraries, Display Templates, and then click Add.
The Add Display Templates screen opens.
- In the Name tab:
 - In the Label Name column, type a unique name for your new contact template.
 - From the Data Source list, select the name of the new data source that you created in Step 4.
- Click the Layout and List Header tabs, and make any changes, and click OK to save your changes.

6. If required, assign your new custom template to a project.

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

About 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 Interaction Manager 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, Interaction Manager 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. Administration Manager 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. Click Libraries, Display Templates, and then click Add.

The Add Display Templates screen opens.

2. Complete the information in the Name tab.

The following table describes some of the fields.

Item	Description
Label Name	The label name appears in the list of templates after clicking the Contact Templates link in Administration Manager. The label name also appears to agents and supervisors when they log in to Interaction Manager. For example, enter the string <i>Contacts Sud Californiens</i> as a French Label Name. When an agent logs in to Interaction Manager, the agent chooses French as the language. When the agent clicks the Contact Information list (in the Contacts tab), the string <i>Contacts Sud Californiens</i> appears as a menu item.
Description	The description appears in the list of templates after clicking Contact Templates in Interaction Manager.
Data Source	The location where information is stored. (Administration Manager provides a default system data source that is already configured for use.)
Assign New Contacts Automatically	Select this option so that an agent or supervisor can create a new contact record during a current interaction. Oracle Contact On Demand 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.

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

It might be easier to create a contact template when running two Web browsers. In the first browser, log in to Administration Manager. In the second browser, log in to Interaction Manager as an agent, and click the Contact tab. With the two browsers open, you can view your change to the contact template in Interaction Manager. However, you must log out of Interaction Manager, and log back in each time you make a change to the template in Administration Manager.

Creating a Sample Contact Template

Complete the steps in the following procedure to create a sample contact template.

To create a sample contact template

1. Click Libraries, Display Templates, and then click 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.
The following table describes 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: Oracle Contact On Demand does not remove permanently deleted contacts from the data source, and flags them 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 Administration Manager. For more information on configuring Oracle Contact On Demand, see <i>Oracle Contact On Demand Installation and Upgrade Guide</i> .
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:
 - Under Contact Tab Layout, double-click the first position (1.)
The Edit Label/Header - Label window appears.
 - Click Header.
The Defined Label - Header window 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 that agents might select when logging in to Interaction Manager. 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 reappears.
7. Double-click field number 2.
8. Select Label.
The Edit Label/Header window: Label appears.

9. Complete the information in the window.

The following table describes some of the fields.

Field	Description
Name	<p>Type a name in several different languages. In Administration Manager, this name appears in the contact template and then the Layout tab. In Interaction Manager, this name appears when an agent or supervisor clicks the Contact tab, for example:</p> <ul style="list-style-type: none"> ▪ English. Home Address ▪ French. Adresse personnelle <p>If an agent selects French when logging in to Interaction Manager, then Oracle Contact On Demand displays a field called, Adresse personnelle, when the agent views, edits, or searches for contacts.</p> <p>If an agent selects English when logging in to Interaction Manager, then Oracle Contact On Demand displays a field called, Home Address.</p>
Associate Label with Action Category	<p>From the list, select an action to associate with this label. Table 6-2 provides a complete list of actions to associate with a label.</p> <p>When an agent or supervisor views a contact in Interaction Manager, the contact's email address appears as a hyperlink. When the agent clicks the hyperlink, Interaction Manager opens a new email message (using the agent's email program) with the contact's email address in the To line.</p> <p>Note: If you select Other, the label is not associated with an action.</p>
Mandatory field	<p>Select this option to make the associated action (identified in the Associated Label with Action Category field) mandatory.</p>
Country Code Field Name	<p>This field appears in the Edit Label/Header window only if you select one of the following from the Associate Label with Action list:</p> <ul style="list-style-type: none"> ▪ Phone ▪ Fax ▪ Pager <p>For these menu items, select contacts.country from the Country Code Field Name list. Thus, when the agent views a contact in Interaction Manager, the contacts.country field appears as a list of country codes.</p>
Field Name	<p>Field names correspond to locations in the data source (such as a column in a database table or view) where information is stored.</p> <p>Note: When using the default system data source, Oracle Contact On Demand creates a set of fields. When using a custom data source, you must create the fields yourself.</p>

10. For 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

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

Deleting a Label and Header

You can delete a label and header.

To delete a label and header

- Select the label or header, and click Delete.

Rearranging Labels and Headers

You can rearrange the order of labels and headers.

To rearrange labels and headers

- Select the label or header, and then click the up or down arrows.

Complex Layouts

You can also create layouts that are more complex, such as those with two headers in the same column and multiple headers in two columns.

Note: The appearance of your layout is exactly what agents and supervisors see when viewing and editing contacts in Interaction Manager.

Table 6–2 describes the label action categories available from the Associate Label with Action - Category list.

Table 6–2 Label Action Categories

List Box Selection	Action in Interaction Manager
Email	The contact's email address appears as a hyperlink, so that when the agent clicks the hyperlink, Interaction Manager opens a new email message (using the agent's email 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, Interaction Manager dials the number.
Fax	The contact's fax number appears as a hyperlink, so that when the agent clicks the hyperlink, Interaction Manager dials the number.
Web Site	The Web site appears as a hyperlink, so that when the agent clicks the hyperlink, Interaction Manager starts a browser on the agent's computer and opens the site.
Pager	The contact's pager number appears as a hyperlink, so that when the agent clicks the hyperlink, Interaction Manager dials the number.
External Application	A hyperlink to an external application appears, so that when the agent clicks the hyperlink, Interaction Manager starts Oracle Contact On Demand.

Selecting the Columns That 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 that 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 that 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.
When finished, the List Header tab displays the new column headings.
5. Click OK to save your changes.

Note: Agents and supervisors must log out and log back in to Interaction Manager before they can see the changes.

Deleting a Custom Contact Template

You cannot delete system contact templates. However, you can delete custom contact templates.

To delete a custom contact template

1. Click Libraries, and then Display Templates.
2. From the Display Templates main screen, select the contact template that you created, and then click Delete.
3. When the confirmation message appears, click OK to confirm the deletion.

Editing a Custom Contact Template

You cannot edit the default system contact template, but you can edit a custom contact template you made. Also, you cannot delete the default system contact template.

To edit a custom contact template

1. Click Libraries, and then Display Templates.
The Display Templates main menu opens.
2. Select the template that you want to change, and click Edit.
The Edit Display Templates screen opens.
3. 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 Interaction Manager.
4. Click the Layout tab, where you can:
 - Change the options that agents use.

- 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).

5. Click the List Header tab to select the columns that agents see when viewing a list of contacts, and then click OK.

Note: Agents and supervisors must log out and log in to Interaction Manager before they can see any changes.

Restoring a System Contact Template

After making changes to a system contact template, you can restore all the default settings.

To restore a system template

1. Click Libraries, and then Display Templates.
The Display Templates main menu opens.
2. Select the system contact 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 Interaction Manager before they can see the changes.

How Oracle Contact On Demand Uses Intelligent Templates to Calculate Scores

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

Consider the two intelligent email templates in [Table 6–3](#).

Table 6–3 Example Intelligent Email Templates

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

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

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

Adding or Editing 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. After 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 any of the matching templates.

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

Oracle Contact On Demand 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 add an Intelligent Chat Template Library

1. From the Navigation pane, click Libraries, Intelligent Chat Templates.
2. Do one of the following:
 - To add a new chat template, click Add.
 - To edit an existing chat template, select the chat template that you want to edit from the list, and click Edit.

The Intelligent Chat Templates screen opens.

3. In the Chat Template Name field, type the name of the first intelligent chat template that you want to Add.
4. In the Description field, describe the purpose of this template.
5. From the URL 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.
6. 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.

For an explanation of how Oracle Contact On Demand uses your template when scanning an incoming chat interaction, see ["How Oracle Contact On Demand Uses Intelligent Templates to Calculate Scores"](#) on page 6-20.

7. Click Apply.
8. Repeat Steps 1 through 7 of this procedure until all the intelligent chat templates necessary for all your chat projects are entered, and then click OK.

For more information on how to add your intelligent chat templates to a chat project, see ["Adding Chat Interactions to a Project"](#) on page 15-12.

Deleting an Intelligent Chat Template Library

Before you delete an intelligent chat library, make sure Oracle Contact On Demand is not using the template by removing the intelligent chat assignment from all chat projects. For more information on projects, see ["Adding Chat Interactions to a Project"](#) on page 15-12.

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 that you created, and then click Delete.
3. When a confirmation message appears, click OK to confirm the deletion.

Adding or Editing an Intelligent Email Template Library

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

You can use intelligent email templates to scan incoming email interactions for specific keywords. When the words are found, Oracle Contact On Demand sends an automatic response to the customer or provides suggested responses to your agents. After receiving the email interaction, agents can view the list of intelligent email templates and the confidence score that 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 add or edit an Intelligent Email Template Library

1. From the Navigation pane, click Libraries, Intelligent Email Templates
2. Do one of the following:
 - To add a new email template, click Add.
 - To edit an existing email template, select the email template you want to edit from the list, and click Edit.

The Intelligent Email Templates screen opens.

3. In the email Template Name field, type the name of the first intelligent email template that you want to Add.
4. In the Description field, describe the purpose of this template.

5. From the URL 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.
6. From the Select Email Acknowledgment to Send list, choose a response.
7. 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.

For more information on how Oracle Contact On Demand uses your template when scanning an incoming email interaction, see ["How Oracle Contact On Demand Uses Intelligent Templates to Calculate Scores"](#) on page 6-20.
8. Click OK.
9. Repeat Steps 1 through 8 of this procedure until you enter all the intelligent email templates necessary for all your email projects.

Deleting an Intelligent Email Template Library

Before you delete an intelligent email template, make sure Oracle Contact On Demand is not using the template by removing the intelligent email assignment from all email projects. For more information on projects, see ["Adding Email Interactions to a Project"](#) on page 15-16.

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 that you created, and then click Delete.
3. When a confirmation message appears, click OK to confirm the deletion.

About Creating and Deleting Libraries

In most cases, creating and deleting libraries is straightforward, but before creating Oracle Contact On Demand Libraries, make sure to answer the questions in the *Administrator's Planning Survey*. For more information on the *Administrator's Planning Survey*, see [Chapter 3, "Planning a Contact Center."](#)

The libraries that you can create in Oracle Contact On Demand include the following:

- ["Adding or Editing an Agent Skills Library"](#) on page 6-24
- ["Adding or Editing an Agent Statuses Library"](#) on page 6-26
- ["Adding or Editing an Agent Departure Reasons Library"](#) on page 6-28
- ["Adding or Editing an ANI Library"](#) on page 6-29
- ["Adding or Editing a Company Prompt Library"](#) on page 6-30
- ["Adding or Editing a Configuration Baseline Library"](#) on page 6-31
- ["Adding or Editing a Countries Library"](#) on page 6-32
- ["Adding or Editing a Data Source Library"](#) on page 6-33

- ["Adding or Editing a Database Connections Library"](#) on page 6-33
- ["Adding or Editing a Departments Library"](#) on page 6-34
- ["Adding or Editing a Dial List Library"](#) on page 6-35
- ["Adding or Editing a DNIS Library"](#) on page 6-36
- ["Adding or Editing an Email Acknowledgments Library"](#) on page 6-37
- ["Adding or Editing a Fax Library"](#) on page 6-38
- ["Adding or Editing a Host Name and Agent Phone Library"](#) on page 6-39
- ["Adding or Editing an Inbound Email Server Library"](#) on page 6-40
- ["Adding or Editing a Language Library"](#) on page 6-43
- ["Adding or Editing a Matching Patterns Library"](#) on page 6-44
- ["Adding or Editing a Parameter Extensions Library"](#) on page 6-45
- ["Adding or Editing a Pattern Matching Group Library"](#) on page 6-46
- ["Adding or Editing a Prefix Routing Group Library"](#) on page 6-46
- ["Adding or Editing a Prefix Routing Pattern Library"](#) on page 6-47
- ["Adding or Editing an SMTP Groups Library"](#) on page 6-49
- ["Adding or Editing an SMTP Server Library"](#) on page 6-50
- ["Adding or Editing a URL Library"](#) on page 6-51
- ["Adding or Editing Business Events to Route Calls"](#) on page 6-53
- ["Adding or Editing Interaction Outcomes and Callbacks"](#) on page 6-55
- ["Creating an CRMOD Integration Library"](#) on page 6-57

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

Deleting a Library

Before deleting Oracle Contact On Demand Libraries, make sure they are not in use. You can delete any of the libraries that you created; however, you must verify that the library you want to delete is not currently being used by Oracle Contact On Demand.

To delete a library

1. Under Libraries, select the library type that contains the library you want to delete.
2. From the list of libraries, click the library you want to delete.
3. Click Delete.

A window opens, asking you if you are sure you want to delete the selected library.

4. Click OK.

Adding or Editing an Agent Skills Library

Agent skills are the abilities that agents possess allowing them to handle interactions coming into the contact center. Oracle Contact On Demand 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, Oracle Contact On Demand routes the caller to the available agent with the highest score for the Speaks Spanish skill.

This task is a step in the ["Roadmap for Setting Up Your Contact Center in Administration Manager"](#) on page 4-1.

To add or edit an Agent Skills library

1. Click Options and then Skills.

The Skills List screen appears.

Idle Time always displays as the default skill in the Skills List. Idle Time is a defined skill for Oracle Contact On Demand, which you cannot delete or edit.

2. Do one of the following:

- To add a new skills library, click Add.
- To edit an existing skills library, select the skills library that you want to edit, and click Edit.

3. In the Skill Name field, type the name of the first skill.

View your answer to ["Question 11: What Skills Will Your Agents Possess for Call Routing?"](#) on page 3-6.

4. (Optionally) in the Description field, describe the abilities an agent with this skill must possess, and then click OK.

The Skills screen reappears, showing the new skill name and description.

5. Repeat Steps 1 through 4 of this procedure to create all the skills specified in *Administrator's Planning Survey*.

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

For more information on how to assign these skills to individual agents, see [Chapter 8, "Creating Administrator, Agent, and Supervisor Accounts."](#)

Deleting an Agent Skill

Deleting old or unused skills creates space in the Oracle Contact On Demand database. It also makes sure that an invalid skill does not appear in Administration Manager screens.

Before deleting a skill, make sure Oracle Contact On Demand is not using the skill by selecting the following areas:

- Remove the skill assignment from all workgroups.
For more information on skill assignment, see ["Assigning Skills to a Workgroup and Weighing the Skills"](#) on page 10-3.
- Ensure the skill assignment level is set to zero (0) for all agents.
For more information on skill assignment, see ["Defining Agent Skills"](#) on page 8-14.

To delete an agent skill

1. Click Options and then Skills.

- The Skill main screen opens.
2. Select the Skill that 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.

Adding or Editing an Agent Statuses Library

Oracle Contact On Demand tracks the status of every agent who is logged in. Supervisors use these status indicators to monitor agent activity. The agents depend on the Interaction Manager status indicator to control their availability.

Oracle Contact On Demand provides predefined statuses. You can add additional statuses that are specific for your contact center, see [Table 6–4](#). For example, you can add Ten Minute Break or Out to Lunch as statuses for your contact center.

[Table 6–4](#) lists the predefined statuses, the condition that triggers the status, and whether agents can receive new interactions while they are set to the status.

Table 6–4 System Statuses 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 Interaction Manager (Contact tab) to initiate an outbound email.
ACD Voicemail	Busy	Agent is responding to a voice mail interaction.
ACD Web Callback	Busy	Agent is handling a Web callback request.
Available	Available	Agent is not handling an interaction. Note: Agents can manually select this status, or they can receive this status after completing an interaction, that is configured 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.
DND - Supervising	Busy	The supervisor is monitoring agents and does not want to be disturbed by incoming (direct or extension) dialed calls. Supervisors who choose to set their status to DND - Supervising will not receive direct incoming calls.
Last Call	Busy	Set by the agent, which indicates not to send any more interactions after completing the current interaction.
Login	Available	Reserved for future use.
Logout	On Break	Agent logged out of Interaction Manager. 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.

Table 6–4 (Cont.) System Statuses and Conditions

Status	Meaning	Condition
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 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.
On Break	On break	Set by the agent which indicates 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 is logged in to Supervision Manager, but is not available to receive ACD interactions.
Wrap Up	Busy	Agent is wrapping-up an interaction. Note: Wrap-up does not apply to outbound calls. Oracle Contact On Demand changes the agent status to Available automatically when the wrap-up time expires.

To add or edit an Agent Statuses Library

1. From the Navigation pane, click Libraries, Agent Statuses.
2. Do one of the following:
 - To add a new agent status library, click Add.
 - To edit an existing agent status library, select the agent status library that you want to edit from the list, and click Edit.

The Agent Status screen opens.

3. Locate the row for the language that the new status supports.
4. In the Status Name column, enter the name of the first agent status from question 12 of the *Administrator's Planning Survey*.
5. In the Description column, describe the activity that an agent must engage in to receive the status.
6. Repeat Steps 3 and 4 of this procedure for all the languages that the status supports.
7. Choose a meaning for this status, and then click OK.

The following table describes the meanings for statuses.

Meaning	Description
Busy	<p>Assign this meaning to a status to indicate that the agent is busy handling a task. Your choice determines the following actions that Oracle Contact On Demand performs:</p> <ul style="list-style-type: none"> ▪ If the task that the agent is handling is an online interaction (call, callback, or Web callback), then incoming interactions are routed to another agent. ▪ If the agent is handling an offline interaction (fax, or email), incoming interactions are routed to the agent until the maximum number of offline interactions allowed for the agent is reached ▪ If the agent is handling a chat interaction, Oracle Contact On Demand routes the incoming chat interactions to the agent until the maximum number of chat interactions allowed for the agent is reached. <p>For more information on the actions performed, see <i>Oracle Contact On Demand Supervision Manager Guide</i>.</p>
Available	<p>Assign this meaning to a status to indicate that the agent is available to handle interactions.</p> <p>While the agent is set to a status with this meaning, Oracle Contact On Demand considers this agent when routing interactions.</p> <p>Note: Setting the No Answer status to a meaning of Available can result in the misrouting of interactions if an agent forgets to log out of Interaction Manager before leaving the workstation.</p>
On Break	<p>The agent is logged in to Oracle Contact On Demand, but is currently unavailable to receive interactions.</p>

8. Repeat Steps 1 through 7 of this procedure until all the statuses you specified in the *Administrator's Planning Survey* are entered.

Note: Clicking Restore Default restores the Oracle Contact On Demand statuses to the default name and meaning.

When an agent clicks the Change Status button in Interaction Manager, Oracle Contact On Demand displays a status list. The agent can choose a status from this list.

Statuses from the Agent Status library display in the My Status area of Interaction Manager, while the meaning (Busy, Available, or On Break) for the status displays in the Current Status area of Interaction Manager. For more information on defining statuses, see [Chapter 3, "Planning a Contact Center."](#)

Adding or Editing an Agent Departure Reasons Library

You can store and track the reasons why agents leave your contact center using the Agent Departure Reasons library.

To add or edit an Agent Departure Reasons Library

1. Click Libraries, and then Agent Departure Reasons.
The list of agent departure reasons appears.
2. Do one of the following:
 - To add a new agent departure reasons library, click Add.
 - To edit an existing agent departure reasons library, select the agent departure reasons library that you want to edit from the list, and click Edit.

The 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 also remove specific departure reasons from the Agent Departure Reason library.

To delete an Agent Departure Reason

1. Click Libraries, and then click Agent Departure Reasons.

The list of agent departure reasons appears.

2. Locate the reason item that you want to remove, and click Delete.

A confirmation message appears.

3. Click OK.

The list refreshes and the reason item no longer appears.

Adding or Editing an ANI Library

Oracle Contact On Demand 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.** Oracle Contact On Demand provides ANI for the outbound calls from a list of numbers allocated for the tenant.

ANI is the calling party's number. For an outbound call, this is the number that the company wishes to send to the destination user as the caller ID, for example, the main company number. DNIS is a service for a group of trunks that allows many telephone numbers to use the same trunk group and the dialed number is passed to the contact center.

When deploying the ANI numbers into the project, a list displays the ANI numbers defined in the ANI library. The list contains only phone numbers, the description is referenced in the library. For more information ANI numbers, see [Table 6-5](#) for ANI fields and descriptions.

Note: ANI number selection is done by project.

Table 6-5 ANI Fields and Descriptions

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

To add or edit an ANI Library

1. Click Libraries, ANI.
2. Do one of the following:
 - To add a new ANI library, click Add.
 - To edit an existing ANI library, select the ANI library that you want to edit from the list, and click Edit.

The ANI screen opens.

3. Enter an ANI Number and a description of the project, and then click OK.

Adding or Editing a Company Prompt Library

Oracle Contact On Demand uses sound recordings as prompts and can play different recordings to greet and inform callers dialing in to your contact center. You can select from a set of default prompts or create custom company prompts. [Table 6-6](#) describes examples of the different ways that Oracle Contact On Demand can use recordings from the Prompt library. For more information on how to record, save, and use customized and supplied default prompts, "[Recording the Prompt](#)" on page 7-3.

Table 6-6 Example of Company Prompt Library

Prompt Purpose	Feature	System Default Prompt
Describes a touch-tone menu (that 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
Requests the caller's ID number.	You can configure Oracle Contact On Demand to ask callers to enter an ID number or other personal information, so you can prioritize the calls.	<i>Please enter your customer ID number followed by the pound key.</i>
Describes a menu of options available to a caller after leaving a voice mail message.	You can create touch-tone menus for callers to hear after leaving a voice mail message.	None
Greets 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.	<i>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.</i>
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.	<i>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.</i>
Informs 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).
Entertains 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.

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

To create company prompts

1. From the Navigation pane, click Libraries, Company Prompts.
2. Do one of the following:
 - To add a new company prompt, click Add.
 - To edit an existing company prompt, select the company prompt that you want to edit from the list, and click Edit.

The Company Prompts screen opens.

3. Type a name for the prompt in the Prompt Name field.
The name you enter appears in the prompt list when you set Administration Manager to the language supported by this prompt.
4. Click the language in which you recorded your prompt.
5. In the Description field, type a description of the prompt.
This description appears in the prompt list when you set Administration Manager to the language supported by this prompt.
6. Type the filename and path to the prompt (or click Browse to choose the file from your computer or network).
7. Click Delete to cancel a prompt recording that you previously uploaded.
8. Repeat Steps 4 through 6 of this procedure for each language for which you recorded a prompt, and then click OK.

Administration Manager stores the new prompt in the Oracle Contact On Demand database and plays it for your callers (or agents), as necessary.

Adding or Editing a Configuration Baseline Library

The Configuration baseline provides the capture of the company configuration at a specific moment in time. Each configuration library entry is saved in a file noted with the date and time of the capture. To generate a report on the configuration baseline, see "[Configuration Baseline Report](#)" on page 21-41.

You can save the current configuration and allow the reporting of subsequent saved versions by the customer in this library. Configuration to be saved include:

- All agents configuration.
- Company configuration
- Company available features
- List of workgroups
- Projects configuration

To add or edit a Configuration Baseline Library

1. From the Navigation pane, click Libraries, and then Configuration Baseline.
2. Do one of the following:

- To add a new configuration baseline library, click Add.
- To edit an existing configuration baseline library, select the configuration baseline library that you want to edit from the list and click Edit.

The Configuration Baseline screen opens.

3. Enter a Name for the Configuration Baseline.
4. In the Description field, describe the Configuration Baseline, and then click OK.

Note: The date and timestamp is logged for this configuration when the OK and Apply actions create the baseline.

Deleting a Configuration Baseline

Before you delete a configuration baseline, make sure Oracle Contact On Demand is not using the Configuration Baseline library for any Configuration Baseline Report.

To delete a Configuration Baseline

1. Click Libraries, and then Configuration Baseline.

The Configuration Baseline main screen opens.

2. Select the Configuration Baseline that you created, and then click Delete.

A confirmation message appears.

3. Click OK to confirm the deletion.

Adding or Editing a Countries Library

You create countries libraries to determine the countries available and the order in which they appear. This topic describes how to create a new countries library or edit an existing countries library.

Note: Countries libraries are system libraries.

To add or edit a countries library

1. Log in to Administration Manager as network administrator (NetAdmin).
2. On the NetAdmin menu, click Countries.
3. Do one of the following:
 - To add a countries library, click Add.
 - To edit an existing countries library, select the countries library from the list, and click Edit.
4. On the name tab, type a name for the countries library, and (optionally) type a description of the countries library in the Description field.
5. On the Content tab, move the countries that you want from the Countries column to the Display Countries and Order column.
6. Use the up and down arrows to specify the display order for the selected countries, and then click OK.

Adding or Editing a Data Source Library

A data source is a record that identifies your contact record structure and where data is stored. Oracle Contact On Demand 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 Contact Records created by agents and supervisors are stored.

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 Oracle Contact On Demand database, then you must customize this table or replace it with a table of your own.

The data source feature works together with the display templates feature as follows:

- 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. For more information, see "[About Default Display Templates Library](#)" on page 6-2.

Caution: Creating data sources is an advanced topic. It might require knowledge of the contact center server architecture, how to plan, and provide and administrator-level access to the default Oracle Contact On Demand database. You might also require other back-end databases, used by a contact center, and administrator rights on one or more contact center servers.

Deleting a Data Source

Deleting unused data sources creates space in the Oracle Contact On Demand database. It also ensures that an invalid data source does not appear in the Administration Manager screen.

Before deleting a data source, make sure Oracle Contact On Demand is not using the data source by checking whether the source was removed from all display templates. For more information about display templates, see "[About Default Display Templates Library](#)" on page 6-2.

To delete a data source

1. Click Libraries and then Data Source.
The Data Source main screen opens.
2. Select the data source that you created, and then click Delete.
A confirmation message appears.
3. Click OK to confirm the deletion.

Adding or Editing 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 find your system data source name (DSN).

To add or edit a Database Connections Library

1. From the Administration Manager Navigation area, click Libraries, Database Connections.

2. Do one of the following:
 - To add a new database connections library, click Add.
 - To edit an existing database connections library, select the database connections library that you want to edit from the list, and click Edit.

The Database Connections screen opens to the Name subtab.

3. Complete the fields, and then click OK.

The following table describes some of the fields.

Field	Description
Name	Type the name for the Database Connection.
Description	Type a description for the Database Connection.
Username	Type a username for the database connection. This username is used by the database for authentication.
Password	Type a password for the database connection. This password is used by the database for authentication. The password must be digits only (no letters).
Alias	Alias refers to the connection pool configured for the container. Type a unique identifier for this database connection.

Adding or Editing a Departments Library

You can create a library of departments to represent the various business departments in which your company's agents work. Though Oracle Contact On Demand does not consider departments when routing interactions, department assignments make agents easier to find using the Company Directory feature of Interaction Manager.

For example, when agents using Interaction Manager want to transfer a call to another agent using the Company Directory or Transfer to Agent window, these controls identify the department in which each agent works. This additional search category makes it easier for agents to find other agents in the company. For information about specifying the department to which agents and supervisors belong, see "[Adding or Editing User Accounts](#)" on page 8-3.

To add or edit a Departments Library

1. From the Navigation pane, click Libraries, Departments.
2. Do one of the following:
 - To add a new departments library, click Add.
 - To edit an existing departments library, select the departments library that you want to edit, and click Edit.
3. From the Departments screen, type a department name and add a description in each language that you intend to support in your contact center, and then click OK.
4. Repeat Steps 1 and 2 of this procedure until a definition for all the departments in your company are added.

Deleting a Department

Before deleting a department, make sure that Oracle Contact On Demand is not using the department by checking whether the department assignment has been removed

from all agents. For more information on departments, see [Chapter 8, "Creating Administrator, Agent, and Supervisor Accounts."](#)

To delete a department

1. Click Libraries and then Department.
2. From the Department main screen, select the department that you created, and then click Delete.

A confirmation message appears.

3. Click OK to confirm the deletion.

Adding or Editing a Dial List Library

Create a Dial List library to identify speed numbers (short cuts) for your agents. A speed number 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 10 or 11 digits, agents press only two or three digits (including the number sign (#) or asterisk (*) key).

The added dial list appears in the Speed Dial dialog in Integrated Client.

To add or edit a Dial List Library

1. From the Navigation pane, click Libraries, Dial List.
2. Do one of the following:
 - To add a new Dial List library, click Add.
 - To edit an existing Dial List library, select the Dial List library that you want to edit from the list, and click Edit.

The Dial List screen opens.

3. In the Name box, type a name for this dial list entry.
4. In the Description box, type a description.
5. Click Plus to add specific information for this entry.

The screen is refreshed to show a new row for entering specific information.

- In the #Dial box, type the number sign (#) and then one or more numbers to assign to the actual phone, PBX, or IP number.

Note: The number sign (#) is required.

- From the Type list, select the type of call from the following:
 - Internal
 - External
 - PBX
 - IP
 - In the Phone Number box, type the entire phone, PBX, or IP number.
6. Repeat Step 5 of this procedure for each additional dial list, and then click OK.

Deleting a Dial List

You can delete a dial list.

To delete a dial list

1. Click Libraries and then Dial List.
2. From the Dial List main screen, select the dial list that you created, and then click Delete.

A confirmation message appears.

3. Click OK to confirm the deletion.

Adding or Editing a DNIS Library

A DNIS (Dialed Number Identification Service) is a service that provides 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, voice mail systems and ISP's offering shared dial-in services.

If you provide Oracle Contact On Demand 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 numbers 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.

This task is a step in the "[Roadmap for Setting Up Your Contact Center in Administration Manager](#)" on page 4-1.

To add or edit a DNIS number library

1. From the Administration Manager Navigation pane, click Libraries, click DNIS library.
2. Do one of the following:
 - To add a new DNIS number library, click Add.
 - To edit an existing DNIS number library, select the DNIS number library you want to edit from the list, and click Edit.

The DNIS Number library main page opens.

3. In the Name field, enter the name of the DNIS list.
4. In the Description field, type a description of the projects that this list supports.
5. Click the Plus icon.

Oracle Contact On Demand adds a blank line for adding a DNIS entry.

6. An administrator can upload a list of numbers from a .csv file by clicking the Upload icon.

The Upload DNIS List box opens.

- Type the name of the list.
- Browse to where the .csv file resides on the hard drive or mapped shared drive, select the .csv file, and then click OK.

Oracle Contact On Demand imports your DNIS list.

7. Click OK.
8. Repeat Steps 1 through 7 of this procedure until all of the phone numbers you compiled in question 2 of the *Administrator's Planning Survey* are added.

For more information on planning a contact center, see "[Question 2: What Numbers Will Telephone-Customers Dial to Reach the Contact Center?](#)" on page 3-2.

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

Deleting a DNIS List

Before deleting a DNIS list, make sure Oracle Contact On Demand is not using the DNIS list by doing the following:

- Remove the DNIS library assignment from all projects. For more information on adding phone interactions, see "[Process of Adding Phone Interactions to a Project](#)" on page 15-3.
- Remove the DNIS library assignment from all agents who have Direct Inward Dialing. For more information creating accounts, see [Chapter 8, "Creating Administrator, Agent, and Supervisor Accounts."](#)

To delete a DNIS list

1. Click Libraries, and then DNIS library.
2. From the DNIS library main screen, select the DNIS list that you created, and then click Delete.
3. When the confirmation message appears, click OK to confirm the deletion.

Adding or Editing 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 add or edit an Email Acknowledgements Library

1. From the Navigation pane, click Libraries, then Email Acknowledgements
2. Do one of the following:
 - To add a new Email Acknowledgements library, click Add.
 - To edit an existing Email Acknowledgements library, select the Email Acknowledgements library you want to edit from the list, and click Edit.

The Email Acknowledgments screen opens.

3. In the Email Acknowledgement Name box, type an email acknowledgement name.
4. In the Description field, describe the purpose or content of this email response.
5. In the Subject field, type a subject line for this response:
 - If the customer's original email Subject line was blank, Oracle Contact On Demand uses the information in this field for the Subject of the email.
 - If the customer's original email message contains a subject, Oracle Contact On Demand uses the customer's subject content.

6. In the Filename field, type the name of the text file that contains the text to place into the body of the email message to the customer.

You can also click the Browse button to find a file to use from your computer or network. The file must be a text file (.txt) or a Web file (.html).

7. Click OK.
8. Repeat Steps 1 through 7 of this procedure to enter all of your email acknowledgments.

Deleting an Email Acknowledgement

Before deleting an email acknowledgement, make sure Oracle Contact On Demand is not using the email acknowledgement by checking whether the email acknowledgement assignment was removed from all email projects. For more information on email projects, see "[Adding Email Interactions to a Project](#)" on page 15-16.

To delete an email acknowledgement

1. Click Libraries, and then Email Acknowledgement.
2. From the Acknowledgement main screen, select the acknowledgement that you created, and then click Delete.
3. When a confirmation message appears, click OK to confirm the deletion.

Adding or Editing a Fax Library

You can compile a library of predefined fax responses, which your agents can use to send to customers. The Fax library helps to ensure that agents provide accurate and consistent responses to all customers.

Caution: You must store Oracle Contact On Demand 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 Oracle Contact On Demand and your telephony hardware.

To add or edit a Fax library

1. From the Navigation pane, click Libraries, Faxes.
2. Do one of the following:
 - To add a new Fax library, click Add.
 - To edit an existing Fax library, select the Fax library you want to edit from the list, and click Edit.
3. In the Fax Name field, type a name for the Fax library.
4. In the Description field, describe the purpose or content of this fax.
5. In the Select TIF file field, enter the path to the image file that is to be faxed to the customer.

You can also click Browse to find the file on your computer or network.

6. Click View to display the fax on your screen to verify it is correct, and then click OK.

- Repeat Steps 1 through 6 of this procedure until all of your faxes are entered.

Deleting a Fax

Before deleting a fax, make sure Oracle Contact On Demand is not using the fax by removing the fax from all projects. For more information on projects, see "[Selecting Fax Responses for the Project](#)" on page 15-21.

To delete a fax

- Click Libraries and then Faxes.
The Fax main screen opens.
- Select the fax that you created, and then click Delete.
- When the confirmation message appears, click OK to confirm the deletion.

Adding or Editing a Host Name and Agent Phone Library

Before Oracle Contact On Demand can connect a call to an agent, it determines the following:

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

Usually, Oracle Contact On Demand retrieves this information when:

- The agent logs in to Interaction Manager. During the login, the agent's name and computer host name are sent to the server.
- The agent uses the Configuration window in Interaction Manager, or an administrator uses the Phone screen (from Options, Agents) to notify 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 window, and provide information 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.

You can associate a computer with a phone by using the Hostname/Agent Phone mapping feature, so that when an agent logs in to Interaction Manager on a computer, the server:

- Retrieves the agent's name and the computer host name
- Performs a lookup to identify which phone is associated with the computer the agent is using

The server needs the information generated from the mapping. By associating a phone with a computer, Oracle Contact On Demand gathers this information no matter which computer the agent uses.

To add or edit a host name and Agent Phone Library

- From the Navigation pane, click Hostname/Agent Phone Mapping.
- Do one of the following:

- To add a new host name and agent phone library, click Add.
- To edit an existing hostname/agent phone library, select the hostname/agent phone library you want to edit from the list, and click Edit.

The Hostname/Agent Phone Mapping screen opens.

3. Complete information on the Pattern Matching Groups screen, and then click OK.

The following table describes some of the fields.

Field	Description
Hostname	Type the host name 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. 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.
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. Oracle Contact On Demand users can choose to set their MSI extensions to work off-hook. In this case, no dial tone sounds and a beep plays when an incoming call arrives. Users who are working off-hook can have calls auto-accepted without having to manually answer each call.

4. Repeat Steps 1 through 3 of this procedure until all the host name and agent phone mappings that your contact center needs are created.

Deleting a Host Name or Agent Phone Mapping

Deleting a host name and agent phone mapping creates an open space in the Oracle Contact On Demand database. It also ensures that an invalid host name does not appear in the Administration Manager screen.

To delete a host name or Agent Phone Mapping

1. Click Libraries and then Hostname/Agent Phone Mapping.
The Hostname/Agent List screen opens.
2. Select the host name that you created, and then click Delete.
3. When a confirmation message appears, click OK to confirm the deletion.

Adding or Editing an Inbound Email Server Library

You can create a library of Inbound Email Server definitions, which Oracle Contact On Demand uses to receive email traffic from customers. From this library, you can specify multiple POP3 and IMAP email servers for contact center email functions.

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

Select more than one Inbound Email Server only if the following condition exists: 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 accounts on different hosts for load balancing. In this case, Oracle Contact On Demand retrieves email from the different accounts in a round-robin fashion by the Oracle Email Distributor.

For example, if the email will be distributed to different email accounts (POP3 and IMAP), and POP3 is busy or not responding, an alarm email is sent and then the Email Distributor then checks IMAP. The cycle continues, except when the Email Distributor finds POP3 fails to respond a second time. After an unsuccessful attempt to send the email, the Email Distributor discontinues sending further alarm emails.

When you choose only one Inbound Email Server, the email address of the project is linked to email account. In this way, if a customer replies to the agent's email (which uses the email address specified for the project), the Email Distributor sends the customer reply email to the correct Inbound Email Server account.

When setting up an agent for email using Administration Manager, you must select an inbound email 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) for one of the following protocols:

- Inbound Email Servers
- IMAP Servers
- SMTP Servers
- SMTP Groups

For more information on creating an IMAP server, see ["Adding or Editing an IMAP Server"](#) on page 6-42. For more information on creating SMTP protocols, see ["Adding or Editing an SMTP Server Library"](#) on page 6-50 and ["Adding or Editing an SMTP Groups Library"](#) on page 6-49.

This task is a step in the ["Roadmap for Setting Up Your Contact Center in Administration Manager"](#) on page 4-1.

To add or edit an inbound email server library

1. From the Navigation pane, click Libraries, Inbound Email Servers, and then Add. The Inbound Email screen opens.
2. Type a name for the inbound email server.
3. In the Description field, describe the inbound email server.
4. Select the Server type. For example, POP3.
5. In the Host field, type the name of the computer hosting the server.
6. In the Port Number field, enter a port number for the server.
7. In the User field, type a unique user name that Oracle Contact On Demand uses to log in to this inbound email server.
8. In the Password field, type a valid password for the user name supplied in Step 7, and then click OK.
9. Repeat Steps 1 through 8 of this procedure until all of your inbound email servers are entered.

Deleting an Inbound Email Server

Before deleting an inbound email server, make sure Oracle Contact On Demand is not using the server by removing it from Company Email Storage and all email projects. For more information on configuring Oracle Contact On Demand, see *Oracle Contact On Demand Installation and Upgrade Guide*.

To delete an inbound email server

1. Click Libraries, and then the inbound email server.
2. Select the inbound email server that you created, and then click Delete.
3. When a confirmation message appears, click OK to confirm the deletion.

Adding or Editing an IMAP Server

You can create a library of IMAP Server definitions, which Oracle Contact On Demand uses to receive email traffic from customers.

To add or edit an IMAP server

1. From the Navigation pane, click Libraries, Inbound Email Servers, and then Add.
The Inbound Email screen opens.
2. Type a name for the Inbound Email Server.
3. In the Description field, describe the Inbound Email Server.
4. Select the Server type. For example, IMAP.
5. Select Enable SSL to indicate SSL support for the IMAP protocol.

Note: SSL support is not available for POP3 server types.

6. In the Host field, type the name of the computer hosting the server.
7. In the Port Number field, enter a port number for the server. The default port setting for an IMAP server is 143 and IMAP SSL defaults to 993.
8. In the User field, type a unique user name that Oracle Contact On Demand uses to log in to this Inbound Email Server.
9. In the Password field, type a valid password for the user name supplied in Step 8, and then click OK.
10. Repeat Steps 1 through 9 of this procedure until all of your IMAP Servers are entered.

Deleting an IMAP Server Before deleting an Inbound Email Server, make sure Oracle Contact On Demand is not using the Inbound Email Server by removing the Inbound Email Server from Company Email Storage and all email projects. For more information on configuring Oracle Contact On Demand, see *Oracle Contact On Demand Installation and Upgrade Guide*.

To delete an IMAP server

1. Click Libraries, and then Inbound Email Servers.
2. At the Inbound Email main screen, select the Inbound Email Server that you created, and then click Delete.
3. When a confirmation message appears, click OK to confirm the deletion.

Adding or Editing a POP3 Server

You can create a library of POP3 Server definitions, which Oracle Contact On Demand uses to receive email traffic from customers.

To add or edit a POP3 server

1. From the Navigation pane, click Libraries, Inbound Email Servers, and then Add. The Inbound Email screen opens.
2. Type a name for the POP3 server.
3. In the Description field, describe the POP3 server.
4. Select the Server type. For example, POP3.

Note: SSL support is not available for POP3 server types.

5. In the Host field, type the name of the computer hosting the server.
6. In the Port Number field, enter a port number for the server. The default port setting for a POP3 server is 110.
7. In the User field, type a unique user name that Oracle Contact On Demand uses to log in to this POP3 server.
8. In the Password field, type a valid password for the user name supplied in Step 7, and then click OK.
9. Repeat Steps 1 through 8 of this procedure until all of your POP3 servers are entered.

Deleting a POP3 Server Before deleting a POP3 server, make sure Oracle Contact On Demand is not using the server by removing it from Company Email Storage and all email projects. For more information on configuring Oracle Contact On Demand, see *Oracle Contact On Demand Installation and Upgrade Guide*.

To delete a POP3 server

1. Click Libraries, and then Inbound Email Servers.
2. At the Inbound Email main screen, select the Inbound Email Server that you created, and then click Delete.
3. When a confirmation message appears, click OK to confirm the deletion.

Adding or Editing a Language Library

You create language libraries to determine the languages available for Oracle Contact On Demand and the order in which they appear.

Note: Language libraries are system libraries.

This topic describes how to create a new language library or edit an existing one.

To add or edit a language library

1. Log in to Administration Manager as network administrator (NetAdmin).
2. On the NetAdmin menu, click Languages.

3. Do one of the following:
 - To add a language library, click Add.
 - To edit an existing language library, select the language library from the list and click Edit.
4. On the name tab, type a name for the language library, and (optionally) type a description of the language library in the Description field.
5. On the Content tab, move the languages that you want from the Languages column to the Display Languages and Order column.
6. Use the up and down arrows to specify the display order for the selected languages, and then click OK.

Adding or Editing a Matching Patterns Library

Oracle Contact On Demand uses matching patterns to support when 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 add or edit a Matching Patterns Library

1. From the Navigation pane, click Libraries, Matching Patterns.
2. Do one of the following:
 - To add a new matching patterns library, click Add.
 - To edit an existing matching patterns library, select the matching patterns library you want to edit from the list, and click Edit.

The Matching Patterns screen opens.

3. Complete the Matching Patterns screen, and then click OK.

The following table describes the fields.

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.

4. Repeat Steps 1 and 2 of this procedure until all the matching patterns that your contact center requires are created.

Deleting a Matching Pattern

Before deleting a matching pattern, make sure Oracle Contact On Demand is not using the pattern by removing the pattern assignment from all Pattern Matching Group. For more information pattern matching groups, see ["Adding or Editing a Pattern Matching Group Library"](#) on page 6-46.

To delete a matching pattern

1. Click Libraries, and then Matching Patterns.
The Matching Patterns main screen opens.
2. Select the matching pattern that you created, and then click Delete.
A confirmation message appears.
3. Click OK to confirm the deletion.

Adding or Editing a Parameter Extensions Library

Create a Parameter Extensions library to integrate each third-party application that Oracle Contact On Demand uses to manage other media types, such as chat interactions. For more information on parameters passed, see [Appendix E, "Parameters Passed to External Applications."](#)

To add or edit a Parameter Extensions Library

1. Click Libraries and then Parameter Extensions.
2. Do one of the following:
 - To add a new parameter extensions library, click Add.
 - To edit an existing parameter extensions library, select the parameter extensions library you want to edit from the list, and click Edit.
3. Enter a name and a description for this application in the Name and Description boxes.
4. Click the Plus icon to open a new window for entering parameter information.

Note: You cannot enter more than 50 parameters for each integrated application.

5. Complete the parameter information.

The following table describes the fields.

Field	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 more information on projects, see ["Adding Chat Interactions to a Project"](#) on page 15-12.

Adding or Editing a Pattern Matching Group Library

A Pattern Matching Group is a collection of matching patterns. You cannot create a Pattern Matching Group until you have created at least one Matching Pattern. For more information on matching patterns, see "[Adding or Editing a Matching Patterns Library](#)" on page 6-44.

To add or edit a Pattern Matching Group Library

1. From the Navigation pane, click Libraries, Pattern Matching Groups.
2. Do one of the following:
 - To add a new pattern matching group library, click Add.
 - To edit an existing pattern matching group library, select the pattern matching group library you want to edit from the list, and click Edit.

The Pattern Matching Groups screen opens.

3. Complete the Pattern Matching Groups screen, and then click OK.

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.

4. Repeat Steps 1 and 2 of this procedure until all the Pattern Matching Groups required for your contact center are created.

Deleting a Pattern Matching Group

Before you delete a Pattern Matching Group, make sure Oracle Contact On Demand is not using the group by removing the group assignment.

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 that you created, and then click Delete.
3. When a confirmation message appears, click OK to confirm the deletion.

Adding or Editing 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 at least one Prefix Routing Pattern is created. For more information on routing patterns, see "[Adding or Editing a Prefix Routing Pattern Library](#)" on page 6-47.

To add or edit a Prefix Routing Group Library

1. From the Navigation pane, click Libraries, Prefix Routing Groups.
2. Do one of the following:
 - To add a new prefix routing group library, click Add.
 - To edit an existing prefix routing group library, select the prefix routing group library you want to edit from the list, and click Edit.

The Prefix Routing Groups screen opens.

3. Complete the Prefix Routing Groups screen, and then click OK.

The following table describes some of the fields.

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.
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	Select the option for the Prefix Routing Patterns that matches the caller's phone number. If the customer's number matches one of the checked patterns, Oracle Contact On Demand reroutes the call to the specified project.

4. Repeat Steps 1 and 2 of this procedure until all the Prefix Routing Groups necessary to meet the custom routing needs of your contact center are created.

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

You can delete a Prefix Routing Group.

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 that you created, and then click Delete.
A confirmation message appears.
3. Click OK to confirm the deletion.

Adding or Editing a Prefix Routing Pattern Library

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 add or edit a Prefix Routing Pattern Library

1. From the Navigation pane, click Libraries, Prefix Routing Patterns.
2. Do one of the following:
 - To add a new prefix routing pattern library, click Add.
 - To edit an existing prefix routing pattern library, select the prefix routing pattern library that you want to edit from the list, and click Edit.

The Prefix Routing Patterns screen opens.

3. Complete the fields on Prefix Routing Patterns screen, and then click OK.

The following table describes the fields.

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. Oracle Contact On Demand 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 Oracle Contact On Demand is not using the pattern by removing the pattern assignment from all the prefix routing groups. For more information on routing groups, see "[Adding or Editing a Prefix Routing Group Library](#)" on page 6-46.

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 that you created, and then click Delete.
A confirmation message appears.
3. Click OK to confirm the deletion.

Adding or Editing 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.

Oracle Contact On Demand 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, Oracle Contact On Demand uses the next server in the group.

Caution: You must add SMTP Groups to Oracle Contact On Demand before you can create a group of SMTP Servers. You must create an SMTP Server Library before you can create an SMTP Group. For more information, see ["Adding or Editing an SMTP Server Library"](#) on page 6-50.

This task is a step in the ["Roadmap for Setting Up Your Contact Center in Administration Manager"](#) on page 4-1.

To add or edit an SMTP Groups Library

1. From the Navigation pane, click Libraries, SMTP Groups.
2. Do one of the following:
 - To add a new SMTP Group Library, click Add.
 - To edit an existing SMTP Group Library, select the SMTP Group Library that you want to edit from the list, and click Edit.

The SMTP Groups screen opens.

3. In the Name field, enter a name for the group of SMTP Servers you are creating.
4. In the Description field, describe this group of SMTP Servers.
5. Select the servers that you want to include in the group.
6. From the Importance list next to each selected server, choose an option, and then 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.
7. Repeat Steps 1 through 6 of this procedure until all SMTP Server Groups required to handle the outgoing email for your email projects are created.

Deleting an SMTP Group

Before deleting an SMTP Server Group, make sure Oracle Contact On Demand is not using the SMTP Group by doing the following:

- Remove the SMTP Group assignment from Company Email Configuration. For more information on company configuration, see [Chapter 5, "Adding and Editing a Company."](#)
- Remove the SMTP Group assignment from all email projects. For more information on email project configuration, see ["Adding Email Interactions to a Project"](#) on page 15-16.

To delete an SMTP Group

1. Click Libraries and then SMTP Groups.
The SMTP Group main screen opens.
2. Select the SMTP Group that you created, and then click Delete.
A confirmation message appears.
3. Click OK to confirm the deletion.

Adding or Editing an SMTP Server Library

You can compile a library of SMTP Server definitions, which Oracle Contact On Demand 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.

Oracle Contact On Demand 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, Oracle Contact On Demand uses the next server in the list of servers that you supply.

This task is a step in the ["Roadmap for Setting Up Your Contact Center in Administration Manager"](#) on page 4-1.

To add or edit an SMTP Server Library

1. From the Navigation pane, click Libraries, SMTP Servers
2. Do one of the following:
 - To add a new SMTP Server Library, click Add.
 - To edit an existing SMTP Server Library, select the SMTP Server Library that you want to edit from the list, and click Edit.The SMTP Servers screen opens.
3. Enter a name for the SMTP Server.
4. In the Description field, describe the SMTP Server.
5. In the Host field, enter the name of the computer hosting the server.
6. In the Domain field, enter the network domain where this server resides, and then 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 field, a connection error might occur. This error will prevent any emails, faxes, or voice mails from being successfully sent. If this error occurs, all emails, faxes, and voice mails are stored in Mail Manager. Contact your network manager for more information.

7. Enter the port number for the SMTP Sever.

Note: Changes made to a port designation for an inbound service are not dynamic.

8. Repeat Steps 1 through 7 of this procedure until all of your SMTP Servers are entered.

Deleting an SMTP Server

Before deleting an SMTP Server, make sure Oracle Contact On Demand is not using the SMTP Server by checking if the SMTP Server is removed from all SMTP Groups. For more information on SMTP Server configuration, see ["Adding or Editing an SMTP Groups Library"](#) on page 6-49.

To delete an SMTP Server

1. Click Libraries and then SMTP Server.
The SMTP Server main screen opens.
2. Select the SMTP Server that you created, and then click Delete.
A confirmation message appears.
3. Click OK to confirm the deletion.

Adding or Editing 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 add or edit a URL Library

1. From the Navigation pane, click Libraries, then URL.
2. Do one of the following:
 - To add a new URL library, click Add.
 - To edit an existing URL library, select the URL library that you want to edit from the list, and click Edit.
3. In the URL Name field, enter the name of the first URL from question 13 of the *Administrator's Planning Survey*.

For more information on planning a contact center, see ["Question 13: Will Your Agents Read Prepared Scripts?"](#) on page 3-7.

4. In the Description field, describe the purpose or contents of this URL.
5. In the URL field, enter the URL address.
6. Click View to preview the contents of the URL.
7. Select all of the Oracle Contact On Demand modules that this URL will serve.

The following table describes each 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. You can enter up to 255 characters. Note: The Chat Push Page and Script text area are enabled with the entry of text or HTML. The entry replaces the default message of customer side.

URL Application	Description
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. (Oracle Contact On Demand supplies a suggested customer response based on the automatic text analysis of the customer's email message.)
Intelligent Chat	Select this option to make the content of this URL available to an agent who is using the suggested customer response option. (Oracle Contact On Demand 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.
WebServices Host	Select this option to specify that the URL will serve as the Web address for Web service hosting.

- If you selected the Script box in Step 7, enter an opening script in the large field, and then click OK.

The opening script displays in the Opening Script area of the agent's Interaction Manager screen. The agent can then click Load Script to view the content specified in the script URL.

- Repeat Steps 1 through 8 of this procedure as many times as necessary to enter all of your URLs.

Deleting a URL

Deleting an old or unused URL creates space in the Oracle Contact On Demand database. It also helps to ensure that an invalid URL will not appear in the Administration Manager screens.

Before deleting a URL, make sure Oracle Contact On Demand is not using the URL by doing the following:

- Remove the URL assignment from all projects. For more information, see [Chapter 15, "Creating Projects."](#)
- Remove the URL assignment from all intelligent email. For more information about email configuration, see ["Adding or Editing an Intelligent Email Template Library"](#) on page 6-22.
- Remove the URL assignment from all intelligent chat. For more information about chat configuration, see ["Adding or Editing an Intelligent Chat Template Library"](#) on page 6-21.

To delete a URL

- Click Options and then URL.
The URL main screen opens.
- Select the URL that you created, and then click Delete.
A confirmation message appears.
- Click OK to confirm the deletion.

About the 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.

Adding or Editing Business Events to Route Calls

For 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 add or edit business events to route calls

1. From the Administration Manager Navigation area, click Libraries, and then Business Events.
2. Do one of the following:
 - To add a new business events library, click Add.
 - To edit an existing business events library, select the business events library that you want to edit from the list, and click Edit.

The Business Event screen opens.

3. Type a name for the event (such as Weekday Business Hours or Weekday After Hours), and then click the Plus icon. The Define Sub Event window opens.
4. In the Define Sub-event window:
 - Type a name in the Sub Event Name box.
 - Under Schedule Event, click Specific Period (to add a one-time event) or Weekly (to add weekly events). The window provides different selections, depending on your choice.
5. When creating a one-time event, select the From and To dates from the calendar, and select the hours and minutes from the lists. For example, if your company is closed on Memorial Day in 2010, select 05/30/10 in both the From and To dates. Then, select times from the lists.

6. When creating a weekly event (an event occurring one or more times for each week at the same time), select each day, select the From and To times for each day from the respective lists, and then 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 change its characteristics.

To edit a business event

1. Select the event, and click the pencil icon.
The Define Sub Event window appears.
2. Complete the steps in "[Adding or Editing Business Events to Route Calls](#)" on page 6-53, beginning with Step 2.

Deleting Business Events

You can delete a business event. For more information on how to add business events to campaigns, see "[About Menu Routing Conditions and Child Nodes](#)" on page 13-14.

To delete a business event

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

About the Outcome Library and Using Interaction Outcomes

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.

You can configure Oracle Contact On Demand 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 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
- Callbacks
- Voice mails

Note: The Preview interaction type requires outcomes to function properly. Otherwise, the result is not determined and Contact On Demand will present the contact again.

You cannot configure the outcomes for these interaction types:

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

When you enable outcomes, the Outcomes 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.

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 or Edit, and then the Controls and Restrictions tab.
2. Select the Require Outcome option.
3. Create one or more outcomes.

For more information on outcomes, see ["Adding or Editing Interaction Outcomes and Callbacks"](#) on page 6-55.

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

For more information on outcomes, see ["Adding Interaction Outcomes to a Project"](#) on page 15-21.

Adding or Editing Interaction Outcomes and Callbacks

An outcome describes the result of an interaction. Some example outcomes include Sale, Request 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 Administration Manager 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, Oracle Contact On Demand initiates the call to the customer.
 - If the customer does not answer, the agent can reschedule the call so that Oracle Contact On Demand calls the customer at a later time.

In Interaction Manager, the Reschedule a Callback feature is in the same window as the outcomes feature. Because both features are in the same window, the outcomes must also be enabled so that agents can reschedule a callback for a later time. For more information, see ["Adding Interaction Outcomes to a Project"](#) on page 15-21.

To add or edit interaction outcomes and callbacks

1. From the Navigation pane, click Libraries, Outcomes.
2. Do one of the following:
 - To add a new outcome, click Add.
 - To edit an existing outcome, select the outcome you want to edit from the list, and click Edit.

The Outcomes screen opens.

3. In the outcome Name field, type the name of the first Outcome from question 20 of *Administrator's Planning Survey*.

For more information on planning, see ["Question 20: Will You Track Interaction Results?"](#) on page 3-10.

4. In the Description field, describe the results or criteria an interaction must meet to qualify for the outcome, and then click OK.
5. Repeat Steps 1 through 3 of this procedure until all the outcomes you specified in *Administrator's Planning Survey* are entered.

For more information on planning, 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 an old or unused outcome creates a small amount of space in the Oracle Contact On Demand database. It also ensures that an invalid outcome does not appear in the Administration Manager screen.

Before deleting an outcome, make sure Oracle Contact On Demand is not using the outcome by checking whether or not the outcome has been removed from all projects. For more information on outcomes, see ["Adding Interaction Outcomes to a Project"](#) on page 15-21.

To delete an outcome

1. Click Libraries, and then Outcome.

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

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

Creating an CRMOD Integration Library

The CRMOD Integration library allows you to configure parameters and customize the creation of objects and the screen navigation that is used in the Oracle Contact On Demand and Oracle CRM On Demand integrated user interface. The libraries define the behavior for inbound interactions for a related project across all enabled media types.

Oracle Contact On Demand includes the following standard CRMOD default libraries when you create a new company:

- Inbound Service Request
- Outbound Dial
- General Inbound
- Sales Inbound

While the default provide advanced capability do not require modification for most installations, you can create a library to accommodate company-specific activities. Complete the following steps to add or copy a CRM On Demand Integration Library.

This task is a step in the "[Roadmap for Configuring the Integration between Oracle Contact On Demand and Oracle CRM On Demand](#)" on page F-13.

To add or copy a CRMOD Integration Library

1. From the Navigation pane, click Libraries, and then CRMOD Integration.
2. Do one of the following:
 - To add a new CRMOD Integration Library, click Add.
 - To copy an existing CRMOD Integration Library, select the CRMOD Integration Library that you want to copy from the list, and click Copy.

The CRMOD Integration screen opens.

3. In the Name field, enter a name for the CRMOD library you are creating.
4. In the Description field, enter a description for the library.
5. Click Apply.

Configuring CRMOD Web Services and Servlet API's for a CRMOD Integration Library

Once you create an CRMOD library, you must define the behavior of CRM On Demand Web service calls and Servlet API's and how the objects display in Interaction Manager.

Each CRM On Demand library consists of the following areas:

- Create Activity
- Screen Pop Options
- End Interaction

This task is a step in the "[Roadmap for Configuring the Integration between Oracle Contact On Demand and Oracle CRM On Demand](#)" on page F-13.

Configuring Create Activity Settings

Create Activity settings determine the parameters and values that will be sent with the Web service call for creating an activity.

To configure a create activity settings

1. From the Navigation pane, click Libraries, and then CRMOD Integration.
2. Select the Oracle CRM On Demand library for which you want to configure the create activity settings.

The CRMOD Integration screen opens.

3. Select Enable Create Activity.
4. Click the Create Activity button.

The Webpage dialog screen displays. By default, Oracle Contact On Demand, populates the Screen, URL, and Service fields with the values that are received from Oracle CRM On Demand. Additionally, the Parameters tab is pre-populated with the Agent Offer Time and Interaction Id parameters.

Note: The value in the Screen field is predetermined by Oracle CRM On Demand and cannot be modified. You can modify the URL and Service fields, if necessary.

5. Click the Add icon to add a new parameter.
6. In the Parameter Names field, enter the CRM On Demand API for the activity you are creating.

For more information on CRM On Demand API's that are available for you to use, see [Appendix F, "Integrating Oracle Contact On Demand with Oracle CRM On Demand."](#)

7. Select a location. For example, Activity. You can choose from:
 - Interaction
 - Custom
 - Parameter Extension
 - Activity
 - Static

Note: The location you select will determine which values you can choose. For more information on the locations and values, see [Appendix F, "Integrating Oracle Contact On Demand with Oracle CRM On Demand."](#)

8. Select a value for the CRM On Demand API. For example, Service Request Id.

Note: The values that are available for you to choose from are determined by the location you select. For more information on the locations and values, see [Appendix F, "Integrating Oracle Contact On Demand with Oracle CRM On Demand."](#)

9. Select the mapping, and then click OK.

For more information on the mappings that are available for you to select, see [Appendix F, "Integrating Oracle Contact On Demand with Oracle CRM On Demand."](#)

10. Repeat Steps 5 through 9 for each parameter you want to add to the activity.

Configuring Screen Pops

Optionally, you can configure a screen pop for the presentation of data that is returned from the configuration of the servlet API. A screen pop is the preferred screen that is presented to an agent in order of priority and based upon the availability of object data in Oracle CRM On Demand. This topic contains a list of screen pop actions that can be taken in order of preference based on availability.

To configure screen pops

1. From the Navigation pane, click Libraries, and then CRMOD Integration.
2. Select the CRM On Demand library for which you want to configure a screen pop.
The CRMOD Integration screen opens.
3. In the Screen Pop Options area, click the Add button.
The Webpage dialog screen displays. By default, Oracle Contact On Demand populates the Screen and URL fields with the parameters that are passed from CRMOD.
4. Click the Add button.
5. Select the type of screen for generating a screen pop. Your options include:
 - Lead
 - Service Request
 - Custom
 - Campaign
 - Contact
 - Activity
 - Opportunity
 - Account

Note: The order of the servlet API's determines the presentation to the agent based on the availability of data in the record Id. For example, if Lead is the first object in the list, Oracle Contact On Demand will query for lead information and if available in the record, it will display it in Interaction Manager. If Oracle Contact On Demand is unable to identify lead information, the second parameter will serve as the next data source for the query, and so forth until data is obtained. If no data matches the configured API's, the information that will display will be relegated to the default setting. As you add API's, the order of the entries shift with the first entry becoming the default setting. If you only establish one API, it will serve as the default. For more information on the available settings, see [Appendix F, "Integrating Oracle Contact On Demand with Oracle CRM On Demand."](#)

6. In the Parameters tab, select a location. For example, Interaction.

Note: The location you select will determine which values you can choose. For more information on the locations and values, see [Appendix F, "Integrating Oracle Contact On Demand with Oracle CRM On Demand."](#)

7. Select a value. For example, Contact Id.

Note: The available values are determined by the location. For more information on the locations and values, see [Appendix F, "Integrating Oracle Contact On Demand with Oracle CRM On Demand."](#)

8. Select the mapping (for example, None), and then click OK.
9. Repeat Steps 4 through 8 for each screen pop you want to configure.

Configuring End Interaction Screen Pops

Optionally, you can configure a screen pop to handle the wrap-up of an interaction.

To configure an end interaction screen pop

1. From the Navigation pane, click Libraries, and then CRMOD Integration.
2. Select the CRM On Demand library for which you want to configure a screen pop for the end of an interaction.

The CRMOD Integration screen opens.

3. Select Enable End Interaction.
4. Click the End Interaction button.

The Webpage dialog screen displays.

Note: The By default, Oracle Contact On Demand populates the Screen and URL fields with the parameters that are passed from Oracle CRM On Demand for a wrap-up or end interaction. For example, the value in the Screen field is *Wrap Up*.

5. Click the Add button to add parameters.

Note: The order of the servlet API's determines the presentation to the agent based on the availability of data in the record Id. For example, if Lead is the first object in the list, Oracle Contact On Demand will query for lead information and if available in the record, it will display it in Interaction Manager. If Oracle Contact On Demand is unable to identify lead information, the second parameter will serve as the next data source for the query, and so forth until data is obtained. If no data matches the configured API's, the information that will display will be relegated to the default setting. As you add API's, the order of the entries shift with the first entry becoming the default setting. If you only establish one API, it will serve as the default. For more information on the available settings, see [Appendix F, "Integrating Oracle Contact On Demand with Oracle CRM On Demand."](#)

6. In the Parameters tab, select a location. For example, Interaction.

Note: The location you select will determine which values you can choose. For more information on the locations and values, see [Appendix F, "Integrating Oracle Contact On Demand with Oracle CRM On Demand."](#)

7. Select a value. For example, Contact Id.

Note: The available values are determined by the location. For more information on the locations and values, see [Appendix F, "Integrating Oracle Contact On Demand with Oracle CRM On Demand."](#)

8. Select the mapping (for example, None), and then click OK.
9. Repeat Steps 4 through 8 for every end interaction screen pop you want to configure.

Customizing Prompts

This chapter describes how to customize your own greetings and prompts for touch-tone menus. It includes the following topics:

- [Prompts](#)
- [Creating a Custom Prompt](#)
- [Setting Up a Music Broadcast](#)
- [Customizing System Prompts](#)
- [Scenarios for Creating Prompts](#)
- [Restoring System Prompts](#)
- [Prompts Grouped by Application and Purpose](#)
- [Order of Workgroup Prompts](#)
- [Call Blocking Prompts](#)
- [Listing All Prompts by Filename](#)

Prompts

You create your own custom greetings and prompts for the touch-tone menus that callers use to navigate your contact center. You can also customize the prompts to match your business practices. You can:

- Record, save, and implement prompt files
- Customize the standard greetings and messages

Prompts are sound recordings (in .wav file format) that Oracle Contact On Demand plays to greet and inform callers dialing in to your company. Oracle Contact On Demand uses two types of prompts:

- **System prompts.** Prompts that Oracle Contact On Demand supplies to support core 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 Oracle Contact On Demand uses to determine which prompt to play in different situations.

About System Prompts

System prompts are general purpose prompts, which are not necessarily unique to a specific contact center company, project, or workgroup. Oracle Contact On Demand 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 customizing. 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). For a complete list of the supplied system prompts, see "[Listing All Prompts by Filename](#)" on page 7-16.

Oracle Contact On Demand divides the system prompts into logical groups by how it uses them. For a list of the prompts in each group, see "[Prompts Grouped by Application and Purpose](#)" on page 7-8.

The groups follow:

- Contact center prompts
- Date and time prompts
- Number prompts
- Agent voice mail prompts
- Company directory navigation prompts
- Project option prompts
- Workgroup option prompts
- Call blocking prompts

About Custom Company Prompts

Custom Company Prompts are prompts you create to greet callers who dial in to a project. For more information on adding the prompts to the Company Prompt library, see "[Adding or Editing a Company Prompt Library](#)" on page 6-30.

Custom Company Prompts 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 Oracle Contact On Demand, you must record the prompts and save them in the Prompt library.

Creating a Custom Prompt

Custom prompts can replace a supplied system prompt, or you can add the custom prompts to the Company Prompt library. You can then use any custom prompt from the library with any customized Oracle Contact On Demand features (such as touch-tone menus, workgroup greetings, and so on).

Planning the Prompt

Before recording the prompt, make sure you understand how Oracle Contact On Demand uses it in the contact center. Make sure you know:

- If your prompt replaces a system prompt for Oracle Contact On Demand. For more information on prompts, see ["Customizing System Prompts"](#) on page 7-5.
- If your prompt supports options and touch-tone menus created specifically for the contact center's projects and workgroups. For more information on prompts, see ["Adding or Editing a Company Prompt Library"](#) on page 6-30.
- The name for the prompt, as it appears in the Oracle Contact On Demand Company Prompt library or in the system prompts.
- The key presses (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 11-5.
- The action Oracle Contact On Demand takes in response to each tone.
- The text for the prompt, including the text describing both the key presses 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 Oracle Contact On Demand, save your prompt recording to a file on your hard disk or network with the following characteristics:

Soft switch installation:

- Format: CCITT u-LAW
- Sampling Rate: 8000 Hz (8.000 Khz)
- 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.

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 Oracle Contact On Demand to play audio to the customer:

- Customers can be on hold while they wait in a workgroup queue. While they wait, you can play a hold prompt.
- After a customer has been connected to an agent, the agent can put the customer on hold. While the customer waits, you can play a prompt or streaming audio (music broadcast).

Setting Up Streaming Audio

To play streaming audio (music broadcast) 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 computer 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. For more information on creating music server resources, see *Oracle Contact On Demand Network Manager Guide*.

To set up streaming audio

1. Start Network Manager and view by host.
2. Add a new resource.
The New Server window appears.
3. Complete the fields in the Add New Server window.
4. Click the Advanced button.
The Music Server window appears.
5. Complete the fields in the Music Server window.

Note: You might 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 music CD in the computer, and run audio player software in repeat mode.
7. Configure your PC so that it makes a SIP call to the music server resource you created in Step 6.

A simple way is to install a software phone on your PC.

- 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

- 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:

- Log in to Administration Manager as a network administrator (NetAdmin).
- Under Options, click Music Broadcast, and then click Add.
- In the Music Broadcast screen, type a name, description, and a SIP URL.

The name and description can be any text, 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 (soft phone).

The channel number must be uppercase.

The IP address is the address that you entered in the Music Server window in Network Manager.

9. Go back to the 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 that you created appears in the list box.

You can also select a music broadcast in a campaign.

Customizing System Prompts

Customize the Oracle Contact On Demand system prompts to meet your 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 Oracle Contact On Demand system prompt.

For more information on prompts, see ["Creating a Custom Prompt"](#) on page 7-2.

2. Click System Prompts, and then click the group that you want to customize.

For example, to customize a prompt in the Agent Voicemail group, click System Prompts, and then click Agent Voicemail. Oracle Contact On Demand displays the list of prompts for the group you chose. For a list of prompts in each group, see ["Prompts Grouped by Application and Purpose"](#) on page 7-8.

3. From the list of prompts, click the prompt that you want 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 field, type a description of the prompt.
This description appears in the prompt list after setting Administration Manager to the language supported by this prompt.
6. Enter the filename and path to the prompt in Step 1.
You can also 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.
You can also click Delete to cancel all changes and return to the Prompts list.
8. Repeat Steps 4 through 7 of this procedure for each language for which you recorded a prompt, and then click OK.
Oracle Contact On Demand stores the new prompt in the Oracle Contact On Demand database, and plays it for callers (or agents), as necessary.

Note: If you modify only one or a few of the Oracle Contact On Demand system prompts, but leave the others in the default condition (female, business-friendly voice), your customers might hear mixed prompts. To make all prompts consistent, consider customizing all system prompts in each language using the same speaker, or using the Oracle Contact On Demand system prompts.

Scenarios for Creating Prompts

In this business scenario, the Oracle Contact On Demand 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. The following topics describe the steps an administrator must perform to create or customize prompts to route callers to the appropriate workgroup.

Note: For the purpose of illustration, some of the steps in the following scenario pertain to Administration Manager features that are discussed in later chapters, including setting up projects and workgroups. For more information on customizing prompts, see ["Creating a Custom Prompt"](#) on page 7-2.

Scenario for Routing the Caller to a Language-Specific 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.

Note: The administrator performs the following task to accomplish this routing task.

Routing the caller to a language-specific 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.

For more information on prompts, see ["Creating a Custom Prompt"](#) on page 7-2.

2. Adds the prompt file to the Company Prompt library under the name, Choose Workgroup.

For more information on prompts, see ["Adding or Editing a Company Prompt Library"](#) on page 6-30.

3. Because this prompt determines the language of the caller, the administrator places 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.

For more information on menus, see ["Creating Standard Menus"](#) on page 11-5.

5. Creates a phone project to route the caller to the Choose Workgroup menu defined in Step 3.

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. For more information on projects, see ["Process of Adding Phone Interactions to a Project"](#) on page 15-3. For more information on prompts, see ["Scenario for Creating a Prompt for Routing to a Specific Workgroup Agent"](#) on page 7-7.

Scenario for Creating a Prompt for Routing to a Specific Workgroup Agent

In this example, 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.

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.

Note: The administrator performs the following task to accomplish this routing task.

To create a prompt for routing to a specific workgroup agent

1. Record and save 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.

For more information on prompts, see ["Creating a Custom Prompt"](#) on page 7-2.

2. Add the prompt file to the Company Prompt library under the name Choose Agent.

Because the caller selected English as the language, the administrator specifies a .wav 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 .wav file recorded in Spanish for the Choose Agent prompt. For more information on prompts, see ["Adding or Editing a Company Prompt Library"](#) on page 6-30.

3. Create a touch-tone menu that plays the Choose Agent prompt recorded in Step 1, and define the actions to take when the caller presses each valid key.

For more information on menus, see ["Creating Standard Menus"](#) on page 11-5.

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.

Oracle Contact On Demand 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 Defined column of the list.

2. Select the prompt that you want to restore, and click Edit.
3. Click the Restore Defaults button.

Oracle Contact On Demand restores the original system prompt in all languages, indicated by a bullet in the Defined column of the prompt list.

Prompts Grouped by Application and Purpose

The following topics describe all the prompts within the contact center environment, grouped by application or purpose.

Contact Center Prompts

Contact center prompts are sounds or messages that Oracle Contact On Demand plays to callers or agents attempting to make calls to or from the contact center. There are 64 contact center prompts.

Date and Time Prompts

Oracle Contact On Demand uses Date and Time prompts ([Table 7-1](#)) to build messages requiring a date or a timestamp, such as those played for agents retrieving their voice mail messages.

Table 7-1 *Date and Time Prompts*

Filename (.wav)	Default Recording	Default Prompt
am	<i>a.m.</i>	Message timestamp.
april	<i>April</i>	Message timestamp.
august	<i>August</i>	Message timestamp.
day01 - day31	<i>First through Thirty-first</i>	Message timestamp.
december	<i>December</i>	Message timestamp.
february	<i>February</i>	Message timestamp.
january	<i>January</i>	Message timestamp.
july	<i>July</i>	Message timestamp.

Table 7–1 (Cont.) Date and Time Prompts

Filename (.wav)	Default Recording	Default Prompt
june	<i>June</i>	Message timestamp.
march	<i>March</i>	Message timestamp.
may	<i>May</i>	Message timestamp.
november	<i>November</i>	Message timestamp.
october	<i>October</i>	Message timestamp.
pm	<i>p.m.</i>	Message timestamp.
september	<i>September</i>	Message timestamp.

Number Prompts

Oracle Contact On Demand uses Number prompts (Table 7–2), the digits from 0 (pronounced as oh) through 99 (pronounced as ninety-nine) to build any greeting or message requiring a number.

Table 7–2 Number Prompts

Prompt	Description
0-99	oh through ninety-nine
point	point

Agent Voice Mail Prompts

Oracle Contact On Demand plays the agent voice mail prompts in Table 7–3 for agents when they are setting up or retrieving their voice mail messages. With the exception of goodafternoon, goodevening, and goodmorning, callers do not hear these prompts.

Table 7–3 Agent Voice Mail Prompts

Filename (.wav)	Default Recording	Default Prompt
at	<i>at.</i>	Agent voice mail retrieval
entermailbox	<i>Please enter your mailbox number, followed by the pound key.</i>	Agent voice mail retrieval
enterpassword	<i>Please enter your password, followed by the pound key.</i>	Agent voice mail retrieval
goodafternoon	<i>Good Afternoon.</i>	Agent voice mail retrieval
goodevening	<i>Good Evening</i>	Agent voice mail retrieval
goodmorning	<i>Good Morning.</i>	Agent voice mail retrieval
hearddeletedmsg	<i>You have heard all of your deleted messages.</i>	Agent voice mail retrieval
heardnewmsg	<i>You have heard all of your new messages.</i>	Agent voice mail retrieval
heardsavedmsg	<i>You have heard all of your saved messages.</i>	Agent voice mail retrieval

Table 7–3 (Cont.) Agent Voice Mail Prompts

Filename (.wav)	Default Recording	Default Prompt
hundred	<i>Hundred.</i>	Agent voice mail retrieval
invalidmp	<i>The password you entered does not match the mailbox you selected.</i>	Agent voice mail retrieval
listennewarcvm	<i>Press 1 to listen to your new voice mail messages, press 2 to listen to your saved voice mail messages, press star to return to the main menu.</i>	Agent voice mail retrieval
listennewarvm_2	<i>Press 1 to listen to your new voice mail messages, press 2 to listen to your saved voice mail messages, press 3 to review your deleted voice mail messages.</i>	Agent voice mail retrieval
listenvoicemailmenu	<i>To repeat this voice mail, press 1. To save this voice mail, press 2. To delete this voice mail, press 3. To log out, press 4.</i>	Agent voice mail retrieval
mailboxmainmenu	<i>Press 1 to retrieve your voice mail messages, faxes and emails, press 2 to record or rerecord your voice mail greeting, press 9 to repeat these choices.</i>	Agent voice mail retrieval
mailserverdown	<i>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 voice mail messages.</i>	Agent voice mail retrieval
msgdeleted	<i>Message deleted.</i>	Agent voice mail retrieval
msgkeepedasnew	<i>Message kept as new.</i>	Agent voice mail retrieval
msgreceivedon	<i>Message received on.</i>	Agent voice mail retrieval
msgsaved	<i>Message saved.</i>	Agent voice mail retrieval
msgsaved_2	<i>Message saved.</i>	Agent voice mail retrieval
msgsent	<i>Message sent.</i>	Agent voice mail retrieval
newacdvoicemailmenu	<i>You have a new ACD voice mail. To listen to this voice mail, press 1. To decline this voice mail and log out, press 2.</i>	Agent voice mail retrieval
newmessage	<i>New message.</i>	Agent voice mail retrieval
newmessages	<i>New messages.</i>	Agent voice mail retrieval
nodeletedmessages	<i>You have no deleted messages.</i>	Agent voice mail retrieval
nomessages	<i>You have no messages in your mail box.</i>	Agent voice mail retrieval
nonewmessages	<i>You have no new messages.</i>	Agent voice mail retrieval
nosavedmessages	<i>You have no saved messages</i>	Agent voice mail retrieval
pleasehold	<i>Please hold while we connect you to the mail server.</i>	Agent voice mail retrieval

Table 7–3 (Cont.) Agent Voice Mail Prompts

Filename (.wav)	Default Recording	Default Prompt
replymailmenu	<i>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.</i>	Agent voice mail retrieval
replymailmenu_2	<i>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.</i>	Agent voice mail retrieval
savemessage	<i>Saved message.</i>	Agent voice mail retrieval
savemessages	<i>Saved messages.</i>	Agent voice mail retrieval
selectgreeting	<i>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.</i>	Agent voice mail setup
thousand	<i>Thousand.</i>	Agent voice mail retrieval
unknowndate	<i>The system is not able to retrieve the date and time of this message.</i>	Agent voice mail retrieval
youhave	<i>You have.</i>	Agent voice mail retrieval

Company Directory Navigation Prompts

Oracle Contact On Demand plays Company Directory Navigation prompts (Table 7–4) for callers who reach a project, which has a menu option allowing the caller to reach an agent by choosing from a company directory.

Table 7–4 Company Directory Navigation Prompts

Filename (.wav)	Default Recording
entername	<i>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.</i>
extnumber	<i>Extension number.</i>
nopeople	<i>There are no names that match your selection</i>
select	<i>Press any key when you hear the name of the person you wish to reach.</i>
selectdir	<i>People matching your selection.</i>
thereare	<i>There are</i>
transferto	<i>Please hold while I transfer you to</i>

Project Option Prompts

Oracle Contact On Demand plays project option prompts (Table 7–5) only if the caller reaches a project with the following options:

- Follow Me Forwarding

- Ask for Customer ID
- Validate Phone Number

Workgroup Option Prompts

Table 7–5 Project Option Prompts

Filename (.wav)	Default Recording	Project Option Prompts
customerentered	<i>The customer id number you entered is</i>	Ask for Customer ID
customeridnum	<i>Please enter your customer id number followed by the pound key.</i>	Ask for Customer ID
_welcome	<i>Hello, and thank you for calling.</i>	<ul style="list-style-type: none"> ■ Ask for Customer ID ■ Validate Phone Number
anotherlocation	<i>To try to reach this person at another location, press one. To send this person a voice mail message, press two.</i>	Follow Me Forwarding Use this prompt to play for a customer if the agent does not answer the primary extension, and the Follow Me Forwarding project option prompt is enabled.
clientnumconfirm	<i>If this is correct, press one. If this is not correct, press two.</i>	Validate Phone Number
entertelno	<i>Please enter your area code and telephone number followed by the pound key.</i>	Validate Phone Number
goodbye	<i>Goodbye, and thank you for calling.</i>	<ul style="list-style-type: none"> ■ Validate Phone Number Use this prompt to ask for customer ID. <ul style="list-style-type: none"> ■ Workgroup option allows a customer to leave a voice mail, and after input failure, allows access to agent voice mail menus.
thankyou	<i>Thank you.</i>	Validate Phone Number Use this prompt to ask for customer ID.
verification	<i>If this is correct, press 1. If this is not correct, press 2.</i>	Ask for Customer ID

Oracle Contact On Demand plays Workgroup Option prompts (Table 7–6) for those callers who 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 Oracle Contact On Demand plays that prompt only if the indicated workgroup option is enabled in the Administration Manager Workgroups screen. For more information on prompts, see ["Adding or Editing a Workgroup"](#) on page 10-2.

Table 7–6 Workgroup Option Prompts

Filename (.wav)	Default	Workgroup Option Prompts
acdcallback	<i>Press 2 to enter your telephone number and receive a callback. Your priority status in the queue will be preserved.</i>	Allow customer to request a callback.
acdentercountrycode	<i>Please enter your country code followed by the pound key.</i>	Allow customer to request a callback.
acdentertelno	<i>Please enter your area code and telephone number followed by the pound key.</i>	Allow customer to request a callback.
acdgoodbye	<i>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.</i>	Allow customer to request a callback.
acdintro	<i>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.</i>	For more information on replacing a prompt with a prompt from your Prompt library, see Select Prompts for this workgroup in " Setting Workgroup Options " on page 10-5.
acdmnu	<i>At any time while you are on hold, you may choose among the following options, or, continue to hold for the next available agent.</i>	<ul style="list-style-type: none"> ■ Allow customer to request a callback ■ Allow customer to leave a voice mail
acdnewmenu	<i>For more options, press 3.</i>	Route to Project Menu
acdrepeat	<i>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.</i>	For more information on replacing a prompt with a prompt from your Prompt library, see Select Prompts for this workgroup in " Setting Workgroup Options " on page 10-5.
acdrepeatmenu	<i>Press 9 to repeat this menu.</i>	Played if either of Allow customer to request a callback or Allow customer to leave a voicemail is checked. For more information on prompts, see Select Prompts for this workgroup in " Setting Workgroup Options " on page 10-5.
acdtring	<i>Two minutes and 19 seconds of ringing (25 rings).</i>	For more information on replacing a prompt with a prompt from your Prompt library, see Select Prompts for this workgroup in " Setting Workgroup Options " on page 10-5.
acdvoicemail	<i>Press 1 to leave a voice mail message</i>	Allow customer to leave a voice mail.
acdwaitestimate	<i>Your estimated wait time is</i>	Play estimated wait time.
acdwaitminute	<i>minute</i>	Not applicable.
acdwaitminutes	<i>minutes</i>	Not applicable.

Table 7–6 (Cont.) Workgroup Option Prompts

Filename (.wav)	Default	Workgroup Option Prompts
countrycodeenter	<i>The country code you entered is</i>	Allow customer to request a callback.
invalid	<i>Invalid entry</i>	Not applicable.
invalidpasscode	<i>Invalid passcode</i>	Not applicable.
music	Fifty-six seconds of prerecorded music.	For more information on replacing a prompt with a prompt from your Prompt library, see Select Prompts for this workgroup in " Setting Workgroup Options " on page 10-5.
numconfirm	<i>If this is correct, press one. To re-enter, press two. To cancel and continue to hold, press three.</i>	Allow customer to request a callback.
numenter	<i>The number you entered is</i>	Allow customer to request a callback.
recordmenu	<i>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.</i>	Allow customer to request a callback.
recordmsg	<i>Please record your message at the tone. When you are finished, press the pound key.</i>	Allow customer to leave a voice mail.

Order of Workgroup Prompts

The order in which workgroup prompts are played can be affected by these features:

- Allow customer to leave a voice mail
- Allow customer to request a callback

For more information on both features and the process of selecting workgroup prompts, see "[Setting Workgroup Options](#)" on page 10-5.

Order of Workgroup Prompts When Not Using Leave Voice Mail or Request Callback

If you are not using either the leave voice mail or request callback feature, and you are using the default system prompts, Oracle Contact On Demand plays workgroup prompts in the order shown in [Table 7–7](#).

Table 7–7 Order of Workgroup Prompts When Not Using Voice Mail or Request Callback

Prompt	Default File	Description
Intro Prompt	acdintro	<i>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.</i>
Music Prompt	music	Fifty-six seconds of prerecorded music.
Hold Prompt	acdrepeat	<i>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.</i>

After Oracle Contact On Demand 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 Voice Mail or Request Callback

If you are using either the leave voice mail or request callback feature, Oracle Contact On Demand plays the workgroup prompts in the order shown in [Table 7-8](#).

Table 7-8 Order of Workgroup Prompts When Using Voice Mail or Request Callback

Prompt	Default File	Prompt Description
Intro Prompt	acdintro	<i>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.</i>
Music Prompt	music	Fifty-six seconds of prerecorded music.
ACD Menu Prompt	acdmenu	<i>At any time while you are on hold, you may choose among the following options, or, continue to hold for the next available Agent.</i>
ACD Voicemail Prompt	acdvoicemail	<i>Press one to leave a voice mail message.</i> Note: This prompt plays if the box, Allow customer to leave a voice mail, is enabled.
ACD Callback Prompt	acdcallback	<i>Press two to enter your telephone number and receive a callback. Your priority status in the queue will be preserved.</i> Note: This prompt plays if the feature, Allow customer to request a callback, is enabled.
ACD Repeat Menu	acdrepeatmenu	<i>Press nine to repeat this menu.</i>
Hold Prompt	acdrepeat	<i>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.</i>

After playing the Hold prompt, Oracle Contact On Demand loops (starting with the music) until an agent becomes available or until the customer hangs up.

Call Blocking Prompts

Oracle Contact On Demand plays the Call Blocking prompts ([Table 7-9](#)) 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 "[Adding or Editing a Call-Blocking List](#)" on page 19-1.

For example, if a customer requesting a callback enters a blocked number, Oracle Contact On Demand plays a prompt notifying the customer that the callback cannot be completed. If an agent attempts to transfer a call to a number identified as blocked, Oracle Contact On Demand plays a prompt to notify the agent that the transfer cannot be completed.

Table 7-9 Call Blocking Prompts

Filename (.wav)	Default Recording	Default Prompt
countryblocked	<i>We are sorry, the country code you entered cannot be dialed from our system.</i>	Call blocking

Table 7–9 (Cont.) Call Blocking Prompts

Filename (.wav)	Default Recording	Default Prompt
numberblocked	<i>We are sorry, the number you entered cannot be dialed from our system.</i>	Call blocking

Listing All Prompts by Filename

[Table 7–10](#) lists all supplied Oracle Contact On Demand prompts, sorted by filename.

Table 7–10 System Prompts Sorted by Filename

Filename (.wav)	Default Recording	Default Prompt
0 - 99	<i>oh through ninety-nine</i>	Project option: <ul style="list-style-type: none"> Ask for customer ID Workgroup options: <ul style="list-style-type: none"> Play estimated wait time Validate Phone Number Company Directory Navigation
_welcome	<i>Hello, and thank you for calling.</i>	Project options: <ul style="list-style-type: none"> Ask for customer ID Validate Phone Number
acdcallback	<i>Press two to enter your telephone number and receive a callback. Your priority status in the queue will be preserved</i>	Workgroup option: <ul style="list-style-type: none"> Allow customer to request a callback.
acdentercountrycode	<i>Please enter your country code followed by the pound key.</i>	Workgroup option: <ul style="list-style-type: none"> Allow customer to request a callback.
acdentertelno	<i>Please enter your area code and telephone number followed by the pound key.</i>	Workgroup option: <ul style="list-style-type: none"> Allow customer to request a callback.
acdgoodbye	<i>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.</i>	Workgroup option: <ul style="list-style-type: none"> Allow customer to request a callback.
acdintro	<i>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.</i>	For more information on replacing a prompt with a prompt from your Prompt library, see Select Prompts for this workgroup in " Setting Workgroup Options " on page 10-5.
acdmenu	<i>At any time while you are on hold, you may choose among the following options, or, continue to hold for the next available Agent.</i>	Workgroup option: <ul style="list-style-type: none"> Allow customer to request a voice mail. Allow customer to request a callback.
acdrepeat	<i>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.</i>	Workgroup option: <ul style="list-style-type: none"> Hold prompt.

Table 7–10 (Cont.) System Prompts Sorted by Filename

Filename (.wav)	Default Recording	Default Prompt
acdrepeatmenu	<i>Press nine to repeat this menu.</i>	Workgroup option: <ul style="list-style-type: none"> ■ Allow customer to request a voice mail. ■ Allow customer to request a callback.
acdring	Two minutes and nineteen seconds of ringing (25 rings)	Workgroup option: Ring is the prompt that Oracle Contact On Demand plays when it is connecting the caller to an available agent. For more information on the Ring option and for replacing a prompt with a prompt from your Prompt library, see Select Prompts for this workgroup in " Setting Workgroup Options " on page 10-5.
acdvoicemail	<i>Press one to leave a voice mail message.</i>	Workgroup option: Allow customer to request a voice mail.
acdwaitestimate	<i>Your estimated wait time is</i>	Workgroup option: Play Estimated Wait Time
acdwaitminute	<i>Minute.</i>	Workgroup option: Play Estimated Wait Time
acdwaitminutes	<i>Minutes.</i>	Workgroup option: Play Estimated Wait Time
am	<i>a.m.</i>	Date/Time
anotherlocation	<i>To try to reach this person at another location, press one. To send this person a voice mail message, press two.</i>	Project option: Follow Me Forwarding Use this prompt to play for Customer if the agent does not answer primary extension and Follow Me Forwarding project option prompt is enabled.
april	<i>April</i>	Date/Time
at	<i>at</i>	Agent voice mail retrieval
august	<i>August</i>	Date/Time
badext	<i>Invalid extension</i>	Played for customers who dial an extension that has not been assigned.
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 Administration Manager.
clientnumconfirm	<i>If this is correct, press one. If this is not correct, press two.</i>	Project option: Validate Phone Number

Table 7–10 (Cont.) System Prompts Sorted by Filename

Filename (.wav)	Default Recording	Default Prompt
confextend	<i>The conference will be ending soon. To extend this conference, press 1. To rejoin the conference without extending the time, press pound (#).</i>	Played to conference participants.
confminutes	<i>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.</i>	Played to the agent who scheduled the conference.
countryblocked	<i>We are sorry, the country code you entered cannot be dialed from our system.</i>	Call blocking
countrycodeenter	<i>The country code you entered is</i>	Workgroup option: Allow customer to request a callback.
customeridentered	<i>The customer id number you entered is</i>	Project option: Ask for customer ID
customeridnum	<i>Please enter your customer id number followed by the pound key</i>	Project option: Ask for customer ID
day01 - day31	<i>First through Thirty-first</i>	Date/Time
december	<i>December</i>	Date/Time
devicenotdefined	<i>This MSI station id is not available. Please select another MSI station id or contact your network administrator.</i>	Played when picking up an MSI agent extension that has not been configured. Note: You cannot modify or delete this prompt using Administration Manager.
entermailbox	<i>Please enter your mailbox number, followed by the pound key.</i>	Agent voice mail retrieval
entername	<i>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.</i>	Company Directory Navigation
enterpassword	<i>Please enter your password, followed by the pound key.</i>	Agent voice mail retrieval
entertelno	<i>Please enter your area code and telephone number followed by the pound key.</i>	Project option: Validate Phone Number
errmsg	<i>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.</i>	Contact Center prompt which is played for the agent if the phone is left off-hook and no keys are pressed.
extnumber	<i>Extension number.</i>	Company Directory Navigation
february	<i>February</i>	Date/Time
goodafternoon	<i>Good Afternoon.</i>	Agent voice mail retrieval

Table 7–10 (Cont.) System Prompts Sorted by Filename

Filename (.wav)	Default Recording	Default Prompt
goodbye	<i>Goodbye, and thank you for calling.</i>	Project options: <ul style="list-style-type: none"> ■ Validate Phone Number ■ Use Prompt to ask for customer ID Workgroup option: <ul style="list-style-type: none"> ■ Allow customer to leave a voice mail ■ After input failure to agent voice mail menus
goodevening	<i>Good Evening</i>	Agent voice mail retrieval
goodmorning	<i>Good Morning</i>	Agent voice mail retrieval
hearddeletedmsg	<i>You have heard all of your deleted messages.</i>	Agent voice mail retrieval
heardnewmsg	<i>You have heard all of your new messages.</i>	Agent voice mail retrieval
heardsavedmsg	<i>You have heard all of your saved messages.</i>	Agent voice mail retrieval
hundred	<i>hundred</i>	Agent voice mail retrieval, workgroup option Estimated Wait Time
invalid	<i>Invalid entry</i>	Invalid Menu Entry
invalidext	<i>Invalid extension, please hang up and try your call again</i>	Played for agents who dial an invalid extension when attempting to call another agent.
invalidmp	<i>The password you entered does not match the mailbox you selected</i>	Agent voice mail retrieval
january	<i>January</i>	Date/Time
july	<i>July</i>	Date/Time
june	<i>June</i>	Date/Time
licensesnotavailable	<i>The number you have dialed is temporarily unavailable due to excessive traffic. Please try your call again later.</i>	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 Administration Manager.
listennewarcvm	<i>Press 1 to listen to your new voice mail messages, press 2 to listen to your saved voice mail messages, press star to return to the main menu</i>	Agent voice mail retrieval
listennewarvm_2	<i>Press 1 to listen to your new voice mail messages, press 2 to listen to your saved voice mail messages, press 3 to review your deleted voice mail messages.</i>	Agent voice mail retrieval
listenvoicemailmenu	<i>To repeat this voice mail, press 1. To save this voice mail, press 2. To delete this voice mail, press 3. To log out, press 4.</i>	Agent voice mail retrieval

Table 7–10 (Cont.) System Prompts Sorted by Filename

Filename (.wav)	Default Recording	Default Prompt
mailboxmainmenu	<i>Press 1 to retrieve your voice mail messages, faxes and emails, press 2 to record or rerecord your voice mail greeting, press 9 to repeat these choices</i>	Agent voice mail retrieval
mailserverdown	<i>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 voice mail messages.</i>	Agent voice mail retrieval
march	<i>March</i>	Date/Time
may	<i>May</i>	Date/Time
msgdeleted	<i>Message deleted</i>	Agent voice mail retrieval
msgkeepedasnew	<i>Message kept as new</i>	Agent voice mail retrieval
msgreceived	<i>Message received on</i>	Agent voice mail retrieval
msgsaved	<i>Message saved</i>	Agent voice mail retrieval
msgsaved_2	<i>Message saved</i>	Agent voice mail retrieval
msgsent	<i>Message sent</i>	Agent voice mail retrieval
music	Hold music (56 seconds of light jazz)	Workgroup Option: Oracle Contact On Demand plays the Music prompt immediately after the Intro prompt, while the caller is waiting to be connected to an agent. When the Music prompt finishes playing, Oracle Contact On Demand plays the Hold prompt. The Music and Hold prompts repeat until an agent becomes available. For more information on the Music option and for replacing a prompt with a prompt from your Prompt library, see Select Prompts for this workgroup in "Setting Workgroup Options" on page 10-5.
newacdvoicemailmenu	<i>You have a new ACD voice mail. To listen to this voice mail, press 1. To decline this voice mail and log out, press 2</i>	Agent voice mail retrieval
newmessage	<i>New message</i>	Agent voice mail retrieval
newmessages	<i>New messages</i>	Agent voice mail retrieval
nodeletedmessages	<i>You have no deleted messages.</i>	Agent voice mail retrieval
nomessages	<i>You have no messages in your mail box</i>	Agent voice mail retrieval
nonewmessages	<i>You have no new messages</i>	Agent voice mail retrieval
nopeople	<i>There are no names that match your selection</i>	Company Directory Navigation
nosavedmessages	<i>You have no saved messages</i>	Agent voice mail retrieval
november	<i>November</i>	Date/Time

Table 7–10 (Cont.) System Prompts Sorted by Filename

Filename (.wav)	Default Recording	Default Prompt
numberblocked	<i>We are sorry, the number you entered cannot be dialed from our system.</i>	Call Blocking
numconfirm	<i>If this is correct, press one. To re-enter, press two. To cancel and continue to hold, press three.</i>	Workgroup option: Allow customer to request a callback.
numenter	<i>The number you entered is</i>	Workgroup option: Allow customer to request a callback.
october	<i>October</i>	Date/Time
pleasehold	<i>Please hold while we connect you to the mail server.</i>	Agent voice mail retrieval
pm	<i>p.m.</i>	Date/Time
point	<i>point</i>	Numbers
recordmenu	<i>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.</i>	Workgroup option: Allow Customer to leave a voice mail
recordmsg	<i>Please record your message at the tone. When you are finished, press the pound key.</i>	Workgroup option: Allow Customer to leave a voice mail
remoteagent	<i>This call has been forwarded from the contact center. To accept this call, press one.</i>	Agent option: Play announcement to agent.
replymailmenu	<i>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.</i>	Agent voice mail retrieval
replymailmenu_2	<i>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.</i>	Agent voice mail 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 Administration Manager.
savedmessage	<i>Saved message.</i>	Agent voice mail retrieval
savedmessages	<i>Saved messages.</i>	Agent voice mail retrieval
select	<i>Press any key when you hear the name of the person you wish to reach.</i>	Company Directory Navigation
selectdir	<i>People matching your selection.</i>	Company Directory Navigation

Table 7–10 (Cont.) System Prompts Sorted by Filename

Filename (.wav)	Default Recording	Default Prompt
selectgreeting	<i>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</i>	Agent voice mail setup
september	<i>September</i>	Date/Time
servicenotavailable	<i>The number you have dialed is temporarily unavailable. Please check the number and try your call again later.</i>	Played for callers reaching a phone number for which no Oracle Contact On Demand project has been configured. Note: You cannot modify or delete this prompt using Administration Manager.
silence	One second of silence.	Played if no prompt exists for a menu. Note: You cannot modify or delete this prompt using Administration Manager.
thankyou	<i>Thank you.</i>	Project options: <ul style="list-style-type: none"> ■ Validate Phone Number ■ Ask for Customer ID Workgroup option: Allow customer to request a callback
thereare	<i>There are</i>	Company Directory Navigation
thousand	<i>Thousand</i>	Project Option: <ul style="list-style-type: none"> ■ Agent Voice Mail Retrieval Workgroup Option: <ul style="list-style-type: none"> ■ Estimated Wait Time
tone	(21 seconds of high-pitched dial tone)	Played for the agent after pressing 9 for an outside line. Note: You cannot modify or delete this prompt using Administration Manager.
tone2	(21 seconds of low-pitched dial tone)	Played for the agent prior to dialing. Note: You cannot modify or delete this prompt using Administration Manager.
transfer to	<i>Please hold while I transfer you to</i>	Company Directory Navigation
unknown date	<i>The system is not able to retrieve the date and time of this message.</i>	Agent voice mail retrieval
verification	<i>If this is correct, press 1. If this is not correct, press 2.</i>	Project option: Ask for Customer ID
youHave	<i>You have</i>	Agent voice mail retrieval

Creating Administrator, Agent, and Supervisor Accounts

This chapter explains how to create administrator, agent, and supervisor accounts. It includes the following topics:

- [Access Rights for User Types](#)
- [Adding or Editing User Accounts](#)
- [Finding an Agent](#)
- [Deleting an Agent Account](#)
- [Configuring Controls and Restrictions for an Agent](#)
- [Configuring Regional Settings for an Agent](#)
- [Configuring an Email Account for an Agent](#)
- [Configuring a Phone Type and Extension for an Agent](#)
- [Defining Agent Skills](#)
- [Configuring Follow Me Numbers](#)
- [Configuring the Applet Console](#)
- [Indicating an Agent Departure Reason](#)
- [Assigning Agents to a Supervisor](#)
- [Configuring Administrator Options](#)
- [Assigning a Supervisor to Agents](#)
- [Assigning Agents to Workgroups](#)
- [Configuring Storage for Voice Messages](#)

Access Rights for User Types

There are six possible user types and each type has different access rights to Oracle Contact On Demand areas and functions. [Table 8-1](#) describes the access rights of the different user types.

Table 8–1 User Types and Access Rights

User Type	Access Rights
Agent	<p>Agents can do the following:</p> <ul style="list-style-type: none"> ■ Log in to Interaction Manager. ■ Accept interactions. ■ Create Contacts. ■ Transfer customers and participate in conferences. ■ Use chat features. ■ Manage tasks. ■ Participate in preview calling.
Supervisors	<p>Supervisors can do the following:</p> <ul style="list-style-type: none"> ■ Log in to Interaction Manager and Supervision Manager. ■ 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. <p>Note: You can create supervisors with either full or limited permissions.</p>
Guest Supervisors	<p>Guest supervisors can do the following:</p> <ul style="list-style-type: none"> ■ Log in to Supervision Manager ■ Set alarms ■ Listen to and monitor the status of agents who are assigned to them
Administrators	<p>Administrators can do the following:</p> <ul style="list-style-type: none"> ■ Log in to Administration Manager, Supervision Manager, and Interaction Manager. ■ After the system administrator gives administrators access, these administrators can edit the data, settings, and configurations in the company. ■ Create agents, supervisors, and guest supervisors. ■ Create reports.
System Administrators	<p>System administrators can do the following:</p> <ul style="list-style-type: none"> ■ Log in to Administration Manager. ■ Access all features available to administrators. ■ Edit all of the data, settings, and configurations in their company. ■ Restrict access of administrators to program features.

Table 8–1 (Cont.) User Types and Access Rights

User Type	Access Rights
Network Administrators can (If Configured)	<p>Network administrators can do the following:</p> <ul style="list-style-type: none"> ■ Log in to Administration Manager. ■ 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. <p>Note: This account is available only if Oracle Contact On Demand is configured for it.</p>

Caution: Before you can add skills to your agent and supervisor accounts, you must first create an Agent Skills library for your contact center. For more information on skills, see ["Adding or Editing an Agent Skills Library"](#) on page 6-24.

Adding or Editing User Accounts

Before you can create accounts for agents and supervisors, you must create an Agent Skills library for your contact center. For more information on skills, see ["Adding or Editing an Agent Skills Library"](#) on page 6-24.

This task is a step in the ["Roadmap for Setting Up Your Contact Center in Administration Manager"](#) on page 4-1 and the ["Roadmap for Configuring the Integration between Oracle Contact On Demand and Oracle CRM On Demand"](#) on page F-13.

To create or edit user accounts

1. Click Options, then click Agents.
2. Do one of the following:
 - To add a new agent account, click Add.
 - To edit an existing agent account, select the agent account you want to edit from the list and click Edit.

The Agents screen: Profile tab opens.

3. Complete the Agent Profile fields.

The following table describes the fields.

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.

Field	Description
Account: Active or Inactive	Click to indicate the agent's status as either Active or Inactive. Note: The default is inactive and the reason for the inactive state is listed as Newly Provisioned User. If the threshold for the number of active agents has been met and you try to add another agent, the following message appears: You have exceeded the number of active users for the company. Please contact your administrator.
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 Administration Manager. Note: The agent's user name must contain only digits (no letters) for the agent to retrieve the voice mail messages from a remote telephone, or to set up voice mail greetings. Caution: When configuring Oracle Contact On Demand for integration with Oracle CRM On Demand, the username and password must match in both instances to ensure password validation and authentication in the integrated environment.
Password	Type a password for the user. The password must be digits only (no letters) for agents or supervisors to retrieve their voice mail messages from a remote telephone, or to set up voice mail greetings. If you are using LDAP authentication, the Password and Confirm Password fields are disabled. For more information on Oracle Contact On Demand support for LDAP, see " Completing the LDAP Authentication Policy " on page 5-26. Note: When you create a new user, and you are using LDAP, Administration Manager 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 using the Default Security Policy, your Oracle Contact On Demand 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 using LDAP. Caution: When configuring Oracle Contact On Demand for integration with Oracle CRM On Demand, the username and password must match in both instances to ensure password validation and authentication in the integrated environment.

4. You must assign a phone extension to your agent.

For more information on configuring phone extensions, see "[Configuring a Phone Type and Extension for an Agent](#)" on page 8-13.

5. If you want the agent to use email, configure an email account.

Note: Configuring an email address for the agent account is no longer a mandatory step. For more information on configuring email accounts, see "[Configuring an Email Account for an Agent](#)" on page 8-12.

6. Click OK.

Finding an Agent

If your company employs a large number of agents, you can use the Agent Search tool to quickly find an agent from a large list of agents.

To find an agent

1. Navigate to the Options screen, and then Agents.
2. From the Agents main screen, 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 field, and then click Go.
 - To sort the list of agents, click any column header.
 - To search a column, select a column, and click a letter or number (A-Z or 1-0).
 - Select a column, enter a string or substring in the Find field, and then click Go.
 - Search using a wildcard character. Select a column, type % (percent sign) as a wildcard character, and then type a substring and wildcard character in the Find field. For example, to find Roger, enter Rog%, %og%, and %er.

Note: You cannot use wildcard characters when you search the Permission column.

Example Search 1: Displaying Only Agents

The following task describes how to display only agents.

To display only agents

1. Select the Permission column.
2. In the Find field, enter agent, and click Go.

Only agents are listed.

Example Search 2: Listing Everyone Whose Last Name Begins with R

The following topic describes how to display everyone whose last name starts with *R*.

To display everyone whose last name starts 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 8-2](#) describes how to move through the list.

Table 8–2 Managing Multiple Pages

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

Deleting an Agent Account

If you create an agent account, you can delete the account later. Deleting departed agents creates space in the Oracle Contact On Demand database, and ensures that an invalid agent account does not appear on Administration Manager screens.

To delete an agent account

- Before you delete an agent account, verify that the account is not in use by Oracle Contact On Demand by doing the following:
 - Remove the agent account from all workgroups.
For more information on workgroups, see ["Adding and Removing Agents from Workgroups"](#) on page 10-2.
 - Remove the agent account as the designated voice mail greeting for all workgroups.
 - Remove the agent account assignment from all supervisors.
For more information on account assignment, see ["Assigning Agents to a Supervisor"](#) on page 8-17.
 - Remove the agent account as the routing target for calls reaching a phone project.
For more information on projects, see ["Process of Adding Phone Interactions to a Project"](#) on page 15-3.
 - Remove the agent account as the routing target for a touch-tone menu selection.
For more information on menus, see ["Creating Standard Menus"](#) on page 11-5.
 - Remove the agent account as the routing target for an action in all campaigns.
For more information on menus, see ["Creating Standard Menus"](#) on page 11-5.
- From the Navigation Pane (under Options), click Agent Profiles.
- Find and select the agent that you want to delete.
For more information on finding agents, see ["Finding an Agent"](#) on page 8-5.
- Click the Departure Reason tab.
- Select the Enable Departure Reason option, and then click OK at the warning message.
A second message appears to make sure you want to remove this agent. When you remove the agent, you cannot undo your actions.
 - Click OK.

The agent is permanently removed from the Oracle Contact On Demand database.

- b. From the list, select a departure reason.

For more information on departure reasons, see ["Adding or Editing an Agent Departure Reasons Library"](#) on page 6-28.

- 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 then click OK.

All of the agent's profile information is deleted from Oracle Contact On Demand.

Configuring Controls and Restrictions for an Agent

You create account restrictions so that each agent has a specific set of permissions according to his or her level of responsibility in the company.

This task is a step in the ["Roadmap for Configuring the Integration between Oracle Contact On Demand and Oracle CRM On Demand"](#) on page F-13.

Restrictions for 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.
- 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.

To create restrictions on account permissions

1. Navigate to the Options screen, and then Agents.
2. On the Agents screen, select the agent for whom you want to configure controls and restrictions.
3. Click the Controls and Restrictions tab.

Caution: Make sure call recording is allowed by law at the agent's location.

4. Complete the Agent Controls and Restrictions screen, and then click OK.

The following table describes the fields.

Field	Description
Disable Call Trace	Disables agents from tracing a call (which might be required in an emergency). When this option is enabled, the Call Trace feature activates recording and alerts the agent's supervisor.
Allow call recording In Interaction Manager	Note: Select this option to allow this agent to record conversations with callers when the agent is logged in to Interaction Manager. Oracle Contact On Demand does not allow recording of agent-to-agent calls.
Enable automatic recording of Agent	Records the 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	The percentage of interactions that will be recorded automatically when the agent is logged in to Interaction Manager. For example, if 20 were entered, two out of every ten interactions the agent received would be recorded. Note: This field will not appear if the company definition includes the option to automatically record 33% of interactions.
Set the number of rings Oracle Contact On Demand will wait for an agent to answer	Set the number of rings Oracle Contact On Demand will wait for the agent to answer. When a call enters the queue, the caller hears a delay message announcement, the call is placed in the workgroup queue, and music (ring.wav file) plays for the caller while waiting for the agent to answer. While an agent is being selected, the caller will hear what has been configured for this event in the menu or IVR campaign. Once an agent is selected, the ring time begins and the caller will hear the phone ringing. For example, if you set the ring time to 5, the ring time would be 20 seconds (5 x 4 = 20). If the agent does not answer, the agent's status is set to No Answer, and the call returns to the queue for the workgroup.
Set the Maximum Number of Interactions the Agent will Handle Simultaneously	<ul style="list-style-type: none"> ■ Chat. Type the maximum number of simultaneous chat interactions Oracle Contact On Demand is allowed to route to the agent, while the agent is logged in to Interaction Manager. ■ Offline. Type the maximum number of simultaneous offline interactions (fax and email) Oracle Contact On Demand is allowed to route to the agent, while the agent is logged in to Interaction Manager. Voice mail is an online interaction. <p>When an agent accepts an interaction, Oracle Contact On Demand automatically changes the status to Busy. If you set the Max Number of Simultaneous Interactions to at least 2, the agent can click Available, and accept another interaction.</p> <p>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.</p> <p>Note: This field affects only chat and offline interactions (fax and email). No matter what value you set in this field, agents can always accept an unlimited number of phone interactions.</p>

Field	Description
Inactive Session Timeout	<p>Use the Inactive Session Timeout to automatically log out a user after a period of inactivity. This option 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.</p> <p>Note: By default, newly created users are assigned a status of <i>inactive</i>. You can also apply an Inactive Session Timeout to the entire company.</p> <p>Note the following:</p> <ul style="list-style-type: none"> ▪ Disable Session Timeout. Oracle Contact On Demand will never automatically log out the account. The Disable Session Timeout feature is applicable only to Interaction Manager and Supervision Manager, not for administrator accounts. ▪ Enable Session Timeout. Select a timeout value between 5 minutes and 24 hours.
Allow Outbound Calls	<p>Note the following:</p> <ul style="list-style-type: none"> ▪ Use Company's Default. If selected, the agent's ability to make outbound calls will be taken from the Allow Outbound Calls list. ▪ Disable. If selected, the agent can never make outbound calls.
Enable international long distance dialing	Allows agents to make long-distance calls to any country code from a workstation.
Restrict long distance dialing to this country code	Allows agents to make long-distance calls only to a specified country code.
Project Billing	Default billing project for the agent in Interaction Manager.
Allow wrap up time after calls	<p>Allows agents the time to wrap up a concluded phone interaction (ACD call, callback, and Web callback). After the wrap-up time expires, Oracle Contact On Demand changes the agent's status to Available, and routes the next interaction.</p> <p>Note: Wrap-up does not apply to direct inbound calls. As soon as an agent disconnects from a direct inbound, the status immediately changes to Available.</p>
Wrap-up time	<p>Type the number of seconds the agent is given to wrap up a concluded phone interaction.</p> <p>Note: Wrap-up does not apply to direct inbound or direct outbound calls.</p>
Require outcome	<p>Allows an agent to access the Outcome library at the end of interactions. For more information about outcomes, see "Making Outcomes Required for Agents" on page 6-55.</p> <p>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).</p>
Display this Agent in the Company Directory	If this option is selected, Oracle Contact On Demand adds the agent to the Company Directory.
When the Agent is logged out, send the call directly to voicemail	If this option is selected, and the agent is logged out, Oracle Contact On Demand sends all calls that are routed to the agent immediately to voice mail.

Field	Description
Status of the Agent at Login	<p>This setting affects only the agent's state when first logging in to Interaction Manager. Afterwards both the agent and Oracle Contact On Demand change the agent's state.</p> <p>Note: The list box contains only the predefined system statuses (Available, Busy, Last Call, and On Break). You cannot select a custom status.</p>
The agent will listen to the ACD Voicemail by:	<p>Use this field to specify whether agents use their email or their phones to access an ACD voice mail:</p> <ul style="list-style-type: none"> ■ If you click Email, the agent can: <ul style="list-style-type: none"> Access ACD voice mails by accepting the voice mail as an interaction Oracle Contact On Demand starts the agent's email client. The voice mail appears as an email attachment. Open the sound file attachment and listen ■ If you click Phone, the agent can access ACD voice mails by accepting the voice mail as an interaction. <ul style="list-style-type: none"> The contact center rings the agent's phone and gives the agent several options, one of which is to listen to the voice mail.
Allow Phone Login	<p>Select this option to provide phone-only agent functionality. When selected, the agent can accept ACD calls without being connected to the Internet or using a Web browser. The agent must log in using a telephone (IVR or similar). This requirement applies to agents with all privilege levels.</p> <p>The default option is unchecked:</p> <ul style="list-style-type: none"> ■ If the user is working off-hook, Oracle Contact On Demand plays a prompt to confirm the login and instructs the agent to hang up and wait for calls. Oracle Contact On Demand also places the agent in the Available state. After finishing the first call, the agent does not hang up and remains connected to receive additional calls. Oracle Contact On Demand logs the agent out when the agent hangs up. <ul style="list-style-type: none"> Working off-hook is not required for the Allow Phone Login field. ■ If the user is working on-hook, Oracle Contact On Demand plays a prompt to confirm the login and instructs the agent to hang up and wait for calls. Oracle Contact On Demand also places the agent in the Available state. After finishing the first call, Oracle Contact On Demand drops the agent's connection, and the agent hears a busy signal. The agent hangs up and waits for the next call.
Allow Workgroup Membership Assignment	<p>Use this option to assign the privilege to contact center supervisors to dynamically move agents to and from workgroups. Supervisors can reassign agents as needed to meet service levels.</p> <p>Note: The access level you give to a supervisor affects the Agent View, Workgroup Statistics, and Workgroup Media Totals Statistics View screens in Supervision Manager. Only those agents who are assigned to a supervisor will be available for workgroup reassignment. For more information on workgroup reassignment, see <i>Oracle Contact On Demand Supervision Manager Guide</i>.</p>

Field	Description
Supervisor Permissions	<p>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.</p> <p>A supervisor with limited access sees only information related to the assigned agents in Supervision Manager. A supervisor with full access sees the information for all agents, workgroups, and interactions for the entire company.</p> <p>Note: The access level you give to a supervisor affects several screens in Supervision Manager. For more information on permissions, see <i>Oracle Contact On Demand Supervision Manager Guide</i>.</p>
Supervisor Template	<p>A list of preset supervisor panel configurations that present frequently used views and data elements.</p> <p>Note: Only administrator level users can create templates. Neither network administrator (NetAdmin) nor supervisor level users can create these templates. For more information on templates, see <i>Oracle Contact On Demand Supervision Manager Guide</i>.</p>
CRMOD Integration Enabled	<p>Select this option to enable the integration of Oracle Contact On Demand and CRMOD for an agent. The integration allows for interaction handling and control.</p> <p>The integration supports:</p> <ul style="list-style-type: none"> ▪ Multiple simultaneous interactions ▪ Independent workspace for each interaction ▪ Access to all Oracle Contact On Demand toolbar actions, including transfer capabilities ▪ Multi-party conference management ▪ Depending on permission level, access to Supervision Manager navigation tabs <p>Note: This option will only be present if the feature is enabled in the company package.</p>

Configuring Regional Settings for an Agent

Agents can be in locations that are different from where the contact center servers reside. The Regional Settings Tab permits you to configure the time zone settings, so the agent can see the times adjusted for his or her location, and not just see the time zone where the contact center server is located.

To configure the regional settings for an agent

1. Navigate to the Options screen, and then Agents.
2. On the Agents screen, select the agent for whom you want to configure regional settings.
3. Click the Regional Settings tab.
4. Complete the Agent Regional Settings, and then click OK.

The following table describes the fields.

Field	Description
Select Time Zone	Choose the time zone in which this agent works. If the agent configures Interaction Manager to use the 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. For more information on time zones, see "Configuring Company Language, Time Zone and Date Format" on page 5-14.
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 the workstation, and choose his or her own date format.

Configuring an Email Account for an Agent

If you configure voice mail to be delivered by email to an agent or if email as a media type is configured for the Company, then you will be required to update the email address information for that agent.

Note: The email address is no longer a required entry field; however if required by the configuration, a notification box is presented.

To configure an email account for an agent

1. Navigate to the Options screen, and then Agents.
2. On the Agents screen, select the agent for whom you want to configure an email account.
3. Click the Email tab.
4. Complete the agent's email information, and then click OK.

The following table describes the fields.

Field	Description
Agent Email Address	Type the full email address for Oracle Contact On Demand to use when routing email interactions to the agent.
Host	Type the name of the computer hosting the Inbound Email Server that this agent uses.
User	Type the user name for the agent to use when accessing the Inbound Email Server.
Password	Type the password for the agent to use when accessing the Inbound Email Server.
Enable SSL	Select this option to add secure Inbound Email and SMTP connections to an IMAP server. Note: This option only is supported on Linux.
Select SMTP Group	Choose the SMTP Server Group for Oracle Contact On Demand to use when handling email sent by this agent.

Configuring a Phone Type and Extension for an Agent

You must configure the phone type and assign an extension for the agent, so that the agent can make outbound calls or receive inbound calls.

To configure a phone type and extension for an agent

1. Navigate to the Options screen, and then Agents.
2. On the Agents screen, select the agent for whom you want to configure a phone type and extension.
3. Click the Phone tab.
4. Use the information in the following table to supply an extension number and phone type for the agent, and then click OK.

Note: H323, SIP, PBX and Outside phone options depend on the company's package definition. One or all of these options might be absent from the list.

Extension Type	Description
Agent Extension Number	Type the extension number for the agent. You can select the extension number from a range of unused numbers for the company. Do not select a extension number that begins with nine. For example, although the range of extension numbers for the company is 100 to 999, select a extension number from only 100 to 899. 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 the Address box.
SIP	Select this option if the agent uses a SIP system, and then type the IP address in the 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.
Play announcement to agent	Select this option to play the prompt: remoteagent.wav. This sound alerts the remote agent that the call is from Oracle Contact On Demand, 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 this option to send all calls directly to the agent's voice mail.
Work Off Hook	Oracle Contact On Demand users can choose to set their MSI extensions to work off-hook. With the off-hook option, there is no ringing, and a beep is played when a call is delivered to the agent. When users are working off-hook, they can also have calls auto-accepted without having to manually answer 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.

Extension Type	Description
Direct Inward Dialing	Select a Company DNIS number. Oracle Contact On Demand 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 (DNIS tab) to indicate that the DNIS was assigned to the agent. For calls that Oracle Contact On Demand routes directly to an agent to appear in reports (such as Direct Dialing Statistics and Project Segment Report), you must select a Billing Project for the agent.)
Play Welcome Prompt	Provides a means for an agent to greet each caller with the same message each time and get ready for the call. The agent records a prompt, such as <i>Hi, my name is <agent's name>. How can I help you today?</i> This prompt plays for each call accepted by that agent.

Defining Agent Skills

Each agent's abilities for the skills you specify must be defined to ensure that calls are routed to the agents who are most capable in the skills required to complete the customer interaction. For more information on specifying skills, see ["Adding or Editing an Agent Skills Library"](#) on page 6-24.

To define agent skills

1. Navigate to the Options screen, and then Agents.
2. On the Agents screen, select the agent for whom you want to define skills.
3. Click the Skills tab.
4. Enter a rating between 0 and 100 for each skill in the Skill Level Rating column, and then click OK.

Note: The higher the rating that you assign to the skill, the more you increase the likelihood that Oracle Contact On Demand routes interactions requiring this skill to this agent.

Configuring Follow Me Numbers

Sometimes, it is necessary to forward inbound calls to another phone number or IP address.

To configure Follow Me numbers

1. Navigate to the Options screen, and then Agents.
2. On the Agents screen, select the agent for whom you want to configure Follow Me numbers.
3. Click the Follow Me tab.
4. Select the Activate Follow Me option.
The Follow Me tab opens.
5. Complete the Follow Me options screen, and then click OK.
The following table describes the fields.

Field	Description
Activate Follow Me	<p>When Follow Me is enabled, Oracle Contact On Demand forwards direct inbound calls (calls made directly to an agent) to the Follow Me phone numbers or IP addresses if the agent does not answer the primary extension.</p> <p>The Follow Me feature does not forward ACD calls (calls routed to an agent through a workgroup). Oracle Contact On Demand places these calls back in the queue for handling by the next available agent.</p> <p>Note: For call forwarding to occur, you must enable the Follow Me box for both the agent and the agent's project.</p>
Define follow me numbers	<p>The following options are available:</p> <ul style="list-style-type: none"> ▪ Outside Phone. From the list, select a country code and type the number that Oracle Contact On Demand forwards the call to if the agent does not answer the call. ▪ SIP. Type the IP address to which Oracle Contact On Demand forwards the call.

Configuring the Applet Console

The Applet Console Configuration tab contains settings that are mainly for advanced troubleshooting. You can use these settings at the company level, or for individual agents.

To configure the applet console

1. Do one of the following:
 - For company level settings, navigate to Options, and then Company.
 - For agent level settings, navigate to Options, and then Agents.
2. Select the company or the agent for whom you want to configure the applet console.
3. Click the Applet Console Configuration tab.
4. Complete the information in the Applet Console Configuration screen, and then click OK.

The following table describes the fields.

Field	Description
Close Connection	<p>Oracle Contact On Demand (Administration Manager, Interaction Manager, and Supervision Manager) occasionally connect to the Oracle Contact On Demand Web Server to find messages (interactions, statistics updates, and so on):</p> <ul style="list-style-type: none"> ▪ If the Close Connection box is <i>not</i> checked, Oracle Contact On Demand continues to use the same HTTP connection to the Web Server indefinitely. ▪ If this box <i>is</i> checked, the connection is reestablished every 60 requests.

Field	Description
Disable Agents Cache	<p>When agents log in to Interaction Manager or supervisors in to Supervision Manager, Oracle Contact On Demand downloads the information about the status, workgroups, users, URLs, outcomes, and so forth from the database so that it will appear in Oracle Contact On Demand.</p> <p>Oracle Contact On Demand keeps this information in memory while the user is logged in. However, when the user logs out, Oracle Contact On Demand writes all the data to temporary files on the user's hard drive. Oracle Contact On Demand 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. These changes include a new project or outcomes, or deleted or edited information.</p> <p>If you select this box, Oracle Contact On Demand downloads all information required by Oracle Contact On Demand from the database each time the user logs in.</p> <p>Note: Selecting this option can result in Oracle Contact On Demand consuming large amounts of resources on both the server and the user's computer.</p>
Debug Level	<p>Select the debug level to allow Oracle Contact On Demand to generate different levels of debug information. You can view the debug information in a file or the Java console:</p> <ul style="list-style-type: none"> ▪ Off. Does not generate any debug information. ▪ Debug. Generates most debugging information. ▪ Info. Generates minimal debug information. ▪ Error. Generates only error information. ▪ Fatal. Only information about fatal errors. ▪ All. Generates all debug and error information. <p>Note: If you choose to send the information to the Java console, the All option consumes most of your memory and CPU.</p> <p>Note: The debug level applies only to the legacy client.</p>
Time to Login (in minutes)	<p>Type the amount of time that Interaction Manager will wait before downloading all required information from the database and logging in to the Interaction Manager Server.</p> <p>Note: If the login takes more than the specified time, Interaction Manager automatically logs out.</p>
Enable log file	<p>Select this option to write debug information to a file. You must also enter a log file path and the path must include the filename.</p> <p>Oracle Contact On Demand creates folders if they do not exist. It writes a debug file to this path on every agent's computer.</p> <p>Note: This field applies only to the legacy client.</p>
Ping Delay in Seconds	<p>Oracle Contact On Demand (Administration Manager, Interaction Manager, and Supervision Manager) occasionally connect to the Oracle Contact On Demand Web Server to find any messages (interactions, statistics updates, and so on).</p> <p>From the list, select the time (Ping Delay in Seconds) that Oracle Contact On Demand applications will wait before sending the next request to the Web Server.</p>
Disable wrap up timer	<p>If this option is checked, the wrap-up timer will not appear to agents in Interaction Manager, which can prevent flicker on some screens.</p>
Disable elapsed (interaction) timer	<p>If this option is checked, the interaction timer will not appear to agents in Interaction Manager, which can prevent flicker on some screens.</p>

Field	Description
Disable Phone State timer	This option is the animated phone icon, which appears in the Interaction Manager Information Bar. If this option is 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.
URL Timeout in Seconds	Type how long Oracle Contact On Demand (Administration Manager, Interaction Manager, and Supervision Manager) must wait for a response from the Web Server before ending the connection and resending the request.

Indicating an Agent Departure Reason

This tab lets you enter the date and reason why an existing agent left the company. It also removes the agent's profile from Oracle Contact On Demand.

Note: Use the Departure Reason tab only for existing agents. For more information on departure reasons, see "[Adding or Editing an Agent Departure Reasons Library](#)" on page 6-28.

To indicate an agent departure reason

1. Navigate to the Options screen, and then Agents.
2. On the Agents screen, select the agent for whom you want to indicate a departure reason.
3. Click the Departure Reason tab.
4. Select the Enable Departure Reason option.
You receive a warning that you are about to remove a user from Oracle Contact On Demand.
5. Click OK.
You receive a second warning.
6. Click OK.
The Departure Reason page appears.
7. From the Departure Reason list, select a departure reason.
8. In the Departure Date field, use the calendar icon to select the date that the agent left the company.
9. (Optional) In the Note field, type any comments you might have about the agent or the agent's reason for leaving, and then click OK.

Assigning Agents to a Supervisor

Use this tab to assign agents to a supervisor. When a supervisor has an assigned agent, the supervisor can interact with that agent using Supervision Manager (view, monitor, obtain agent statistics, and so on).

To assign agents to a supervisor

1. Navigate to the Options screen, and then Agents.
2. On the Agents screen, select the supervisor account to which you want to assign agents.

3. Click the Agents to Supervise tab.

The Agents to Supervise screen opens.

Supervisors can interact only with agents who are assigned to them.

Note: You cannot assign more than 100 agents to the same supervisor.

4. Select the box next to each agent to assign to the supervisor, or if you want to select all of the agents, click All, and then click OK.

Configuring Administrator Options

Use this tab to limit administrator access to the features of Administration Manager.

To configure administrator options

1. Navigate to the Options screen, and then Agents.
2. On the Agents screen, select the administrator account for which you want to configure options.
3. Click the Administrator Configuration tab.

The Administrator Configuration tab opens.

Note: 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 Navigation bar item in Administration Manager. If you uncheck an item, the administrator whom 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
4. Click OK.

Assigning a Supervisor to Agents

Use this tab to assign an agent to a supervisor.

To assign an agent to a supervisor

1. Navigate to the Options screen, and then Agents.
2. On the Agents screen, select the agent to whom you want to assign a supervisor.
3. Click the Supervisors tab.

The 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.
4. Select the box next to the name of each supervisor that is allowed to supervise this agent, and then click OK.

Assigning Agents to Workgroups

You can assign agents to a workgroup. For more information on creating workgroups, see ["Adding or Editing a Workgroup"](#) on page 10-2.

To assign an agent to a workgroup

1. Navigate to the Options screen, and then Agents.
2. On the Agents screen, select the agent whom you want to assign to a workgroup.
3. Click the Workgroups tab.
4. Select the box next to each workgroup to which you want to make the agent a member, and then click OK.

There is no limit to the number of workgroups to which an agent can belong.

Configuring Storage for Voice Messages

Use this tab to specify where you want to store your voice messages.

To configure where you store voice messages

1. Navigate to the Options screen, and then click Agents.
2. On the Agents screen, select the agent account for which you want to configure unified messaging.
3. Click the Unified Messaging tab.
4. In the Unified Messaging screen, select one of the following choices, and then click OK:
 - **Company Default.** Sets the user to use the company default setting. The default setting is set in the Unified Messaging tab of the Company screen. For more information on messages, see ["Storing Voice Mails \(Unified Messaging\)"](#) on page 5-29.
 - **Mail Server.** Stores voice mails on the Network Email Server.
 - **Internal Voicemail.** Stores voice mails locally.

Setting Up Proxy Servers

This chapter explains how to add or edit a proxy server and log in through a proxy server. It includes the following topics:

- [Proxy Servers](#)
- [Adding or Editing a Proxy Server](#)

Proxy Servers

If there are proxy servers on your network, you can configure Administration Manager so that Oracle Contact On Demand users (agents, supervisors, and even administrators) must log in to a proxy server before they can log in to an Oracle Contact On Demand application:

- You can add as many of your proxy servers as you want to Administration Manager. For more information on proxy servers, see "[Adding or Editing a Proxy Server](#)" on page 9-1.
- 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. For more information on proxy settings, see "[Logging in Through a Proxy Server](#)" on page 9-2.

Adding or Editing a Proxy Server

Do the following task to add or edit a proxy server.

To add or edit a proxy server

1. Under Options, click Proxies.
2. Do one of the following:
 - To add a new proxy server, click Add.
 - To edit an existing proxy server, select the proxy server that you want to edit from the list, and then click Edit.
3. In the Name tab, type a name and description of the proxy server.
The name and description that you enter are used only in Administration Manager.
4. Click the Settings tab.
5. Complete the information in the Proxies Settings screen.

The following table describes the fields.

Field	Description
Username	Indicates the user name that agents, supervisors, and administrators enter to be authenticated by the proxy server.
Password	Indicates the password that agents, supervisors, and administrators enter to be authenticated by the 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 option, and instruct your agents and supervisors to log in again.

6. Click the Agents tab.
7. Select the agents and supervisors who are required to access Oracle Contact On Demand through the proxy server, and then click OK.

Logging in Through a Proxy Server

The following procedure describes how users (administrators, supervisors, and agents) assigned to a proxy server log in to Oracle Contact On Demand.

To log in through a proxy server

1. The user starts Internet Explorer, and enters the Oracle Contact On Demand URL (for Administration Manager, Supervision Manager, or Interaction Manager).

The following can occur:

- If the user is outside a firewall, a window appears asking for the network login.
- If the user is not outside the firewall, the Oracle Contact On Demand normal login page appears.

2. The user enters a user name and password.

A window for the user's proxy credentials appears.

3. The user enters the user name and password that you entered in the Proxy - Settings tab, and then clicks Yes.

Oracle Contact On Demand opens.

Setting Up Workgroups

This chapter describes how to set up workgroups for your contact center. It includes the following topics:

- [About Workgroups](#)
- [Adding or Editing a Workgroup](#)
- [Adding and Removing Agents from Workgroups](#)
- [Setting a Routing Association](#)
- [Assigning Skills to a Workgroup and Weighing the Skills](#)
- [Defining Workgroup Overflow Conditions](#)
- [Setting Workgroup Options](#)
- [Setting Workgroup Service Levels](#)
- [Deleting a Workgroup](#)

About Workgroups

An Oracle Contact On Demand workgroup is a group of agents who 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 workgroup do not need to be sitting in the same room or even in the same building. Because 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, Oracle Contact On Demand can identify and route interactions to the agent most qualified to receive them.

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. For more information on assigning a priority level to each customer, see [Chapter 17, "Prioritizing Phone Customers."](#)

Note: Not all contact centers use workgroups. If you do not want 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 you do not have to create workgroups for the contact center.

If Oracle Contact On Demand routes a phone interaction to a workgroup for which no agents are logged in, callers can leave a message, and change the interaction type from ACD Call to ACD Voicemail. Then, when an agent who is a member of the workgroup logs in to Interaction Manager, Oracle Contact On Demand immediately sends the ACD Voicemail interaction to the agent for handling.

Adding or Editing a Workgroup

Before creating a workgroup, the following must exist:

- **Agent accounts.** For more information on accounts, see [Chapter 8, "Creating Administrator, Agent, and Supervisor Accounts."](#)
- **Defined agent skills to support the workgroup.** For more information on workgroups, see ["Adding or Editing an Agent Skills Library"](#) on page 6-24.

This task is a step in the ["Roadmap for Setting Up Your Contact Center in Administration Manager"](#) on page 4-1.

To add or edit a workgroup

1. Navigate to the Options screen, then Workgroups.
2. Do one of the following:
 - To add a new workgroup, click Add.
 - To edit an existing workgroup, select the workgroup that you want from the list, and click Edit.
3. Complete the fields, and then click Apply.

The following table describes the fields.

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. For more information on accounts, see [Chapter 8, "Creating Administrator, Agent, and Supervisor Accounts."](#)

To add and remove agents from workgroups

1. Navigate to the Options screen, and then click Workgroups.
2. Click the workgroup, and then Edit.

The Workgroups screen appears.

3. Click the Agents tab.
4. Select the 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, click All.
6. To remove all agents from the workgroup, click Clear.
7. Click Apply.

Setting a Routing Association

Typically, Oracle Contact On Demand 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. Click Options, and then Workgroups.
2. Click the workgroup, and click Edit.
3. From the Workgroup screen, click the Association tab.
4. Complete the information in the Association screen.

The following table describes the fields.

Field	Description
Allow routing association to wait up to [] seconds	<p>If this option is checked, Oracle Contact On Demand 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 period set, the interaction is routed to the first available agent in the workgroup.</p> <p>Oracle Contact On Demand tries to route the interaction to the preferred agent only if:</p> <ul style="list-style-type: none"> ■ 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.	<p>If this option is checked, Oracle Contact On Demand tries to route the interaction to the preferred agent, even if the agent is logged out. Oracle Contact On Demand waits for the amount of time set in the Seconds field. If the agent does not log in within that time, the interaction is routed to the next available agent.</p>

Assigning Skills to a Workgroup and Weighing the Skills

Oracle Contact On Demand 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 who is best qualified to handle the interaction.

When Oracle Contact On Demand 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 assign and weigh skills in a workgroup

1. Click Options and then Workgroups.
2. From the Workgroups screen, click the Workgroup, and then click Edit.
3. From the Edit Workgroups screen, click the Skills tab.
4. In the Skill-level Weight column, type the weight number (importance) to assign to each skill, and then click OK.

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.

Defining Workgroup Overflow Conditions

To make sure that interactions waiting too long for an agent are given immediate attention, define the workgroup overflow conditions. Oracle Contact On Demand handles two workgroup overflow conditions:

- Interaction wait-time exceeded
- Number of queued interactions exceeded

Oracle Contact On Demand 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. Click Options, and then Workgroups.
2. From the Workgroups screen, click the Workgroup, and then click Edit.
3. From the Edit Workgroups screen, click the Overflow tab to access the Overflow screen.
4. Check Enable Workgroup overflow.

The screen is refreshed to display the Workgroup Overflow screen.

5. Complete the fields on the Workgroup Overflow tab, and then click OK.

The following table describes the fields.

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 to 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 to the front of the queue if the ratio of the interactions to agents exceeds the number that you specify.

Field	Description
Overflow occurs when the number of queued Interactions exceeds ____	Select this option to take the specified overflow action on the interaction to 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 by the specified number, when the specified overflow condition is met. The Interaction Manager Information Bar displays the priority of the transferred interaction as selected when defining the workgroup overflow condition
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 condition is met. Note: A phone interaction transfer to an overflow workgroup occurs without notification of workgroup prompts.
Route to Project Menu	Routes the call to a project menu (phone menu). For more information on menus, see Chapter 11, "Creating Project Menus."
Deflect calls when Max. Calls Waiting per Agent is ____	Type the maximum number of waiting calls that, when reached, will trigger Oracle Contact On Demand to deflect any further calls from that workgroup.

Setting Workgroup Options

The following topic describes how to set up workgroup options.

To set workgroup options

1. Click Options, and then Workgroups.
The Workgroups screen appears.
2. Click the Workgroup, and then click Edit.
The Edit Workgroups screen appears.
3. Click the Options tab.
4. Complete the fields in the Workgroup Options tab.
The following table describes the fields.

Field	Description
Initial Wait Time	Type the number of minutes it takes an agent to complete a typical interaction. Oracle Contact On Demand 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 that you enter. Oracle Contact On Demand 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 the estimated wait time. If the customer's estimated wait time is greater than 99 minutes, Oracle Contact On Demand 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. For information on recreating your Chat Request form, see "Generating a Chat Request Form" on page 15-15.

Field	Description
Allow customer to request a callback	<p>Select this option to let the caller request a callback if agents are busy. Selecting this option causes Oracle Contact On Demand to play the prompt <code>acdcallback.wav</code> to the customer, and allows the customer to enter a number where the customer can be reached.</p> <p>Note: If the customer enters a callback number that is different from the number that originated the call, Oracle Contact On Demand uses the customer-supplied number to perform the callback and to look up the customer's contact information during the callback interaction.</p> <p>For agents to reschedule a callback, you must also require agents to assign an outcome to the interaction. For more information on outcomes, see "Adding or Editing Interaction Outcomes and Callbacks" on page 6-55.</p>
Always Use This Country Code	<p>If this option is not selected, Oracle Contact On Demand prompts the customer for a country code.</p> <p>If this option is selected, Oracle Contact On Demand calls the customer back using the country code specified.</p>
Allow customer to leave a voicemail	<p>Select this option to allow a caller waiting in the queue to leave a voice mail message for the next available agent. Oracle Contact On Demand prompts the caller to enter the following prompts (played in the following order):</p> <ul style="list-style-type: none"> ■ <code>acdmnu.wav</code> ■ <code>acdvoicemail.wav</code>
Allow Customer to Route to Project Menu	<p>Select this option to allow a caller waiting in queue to select the option to be routed to a new project menu. Oracle Contact On Demand automatically plays a default prompt (<code>acdnewmenu.wav</code>). You can also choose another prompt from the Select Prompt list.</p>
Stay in the Queue	<p>If this option is selected, the caller remains in the queue until an agent logs in and becomes available.</p>
Disconnect	<p>If this option is selected, and no agent is logged in, the caller or chat customer is disconnected immediately.</p>
Go to voicemail, play Agent greeting	<p>Selects an agent with a recorded greeting. Oracle Contact On Demand sends the call to the voice mail and plays the agent's greeting followed by <code>acdvoicemail.wav</code> (<i>Press one to leave a voice mail message.</i>).</p>
Route to Menu	<p>Routes the caller to the menu you select from the list. (Select this option, after meeting specific thresholds, to discontinue answering calls and give new callers an intercept message. For more information on menus, see Chapter 11, "Creating Project Menus.")</p>
Do not play ACD intro	<p>If this option is selected, Oracle Contact On Demand does not play the prompt if no agents are logged in. (If you know that no agents are available, and you want to route the call to Disconnect, you probably do not want to play an ACD introduction prompt telling the customer to wait for an agent.)</p>

Field	Description
Select Prompts for this workgroup	<p>Workgroups can play several types of prompts. For each type, select the system default prompt or a custom prompt.</p> <p>Workgroups play the following prompts:</p> <ul style="list-style-type: none"> ■ Intro. The initial greeting Oracle Contact On Demand plays to the caller when entering the workgroup. Choose System Default to play the accintro.wav prompt. ■ Hold. The prompt that Oracle Contact On Demand 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.) Oracle Contact On Demand plays the Hold prompt after the Music prompt ends. Choose System Default to play the accrepeat.wav prompt. ■ Whisper. The prompt that Oracle Contact On Demand plays to an agent immediately after the agent accepts an ACD call and while working off-hook. The customer cannot hear the prompt. ■ Ring. The prompt that Oracle Contact On Demand plays when it is connecting the caller to an available agent. Choose System Default to play the accring.wav prompt. ■ Music. Oracle Contact On Demand plays the Music prompt immediately after the Intro prompt, while the caller is waiting to be connected to an agent. When the Music prompt finishes playing, Oracle Contact On Demand 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. <p>Note: This list box 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.</p> <p>The order in which Oracle Contact On Demand plays workgroup prompts can be affected by the following features:</p> <ul style="list-style-type: none"> ■ Allow customer to leave a voice mail ■ Allow customer to request a callback <p>For more information on prompts, see "About Custom Company Prompts" on page 7-2.</p>

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:

- 80% of all online interactions to be accepted by an agent in 20 seconds 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 20 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

Note: Make sure ACD calls have a higher priority than voice mail in the workgroup queue. Voice mails are considered online interactions.

To set workgroup service levels

1. Click Options, Workgroups, and then Service Level.
2. From the list box menus, select a service level for online and offline interactions, and then click OK.

Deleting a Workgroup

Delete a workgroup when it is no longer required. The deleted workgroup is no longer available to receive interactions, but it remains available for reporting in Administration Manager Reports.

Before deleting a workgroup, ensure that the workgroup is not in use by doing the following:

- Remove the workgroup as the routing destination for incoming interactions in all Oracle Contact On Demand projects.

For more information on projects, see "[Adding or Editing a Project Definition](#)" on page 15-1.

- Remove the workgroup as a touch-tone option in all project menus.

For more information on menus, see "[Creating Standard Menus](#)" on page 11-5.

- Remove the workgroup as an action in all campaigns.

For more information on campaigns, see "[Process of Deploying a Simple Campaign](#)" on page 13-7.

To delete a workgroup

1. Click Options, and then Workgroups.
2. Click the Workgroup that you want to remove.
3. Click Delete.
A confirmation message appears.
4. Click OK.

Creating Project Menus

This chapter describes how to create project menus to provide callers choices when navigating your contact center, to perform pre-work (such as obtain and verify information from the IVR system) before delivering a call to an agent, and to handle an interaction without the need for agent intervention. It includes the following topics:

- [About Project Menu Types](#)
- [Using Variables in Menus](#)
- [About User-Defined Variables](#)
- [About System Variables](#)
- [Creating Standard Menus](#)
- [Using the Set Variable Control](#)
- [About the Case Tab](#)
- [Creating Get Digits Menus](#)
- [Creating Play Value Menus](#)
- [Creating SQL Query Menus](#)
- [Example of Creating Query Tables](#)
- [Creating Record Menus](#)
- [Listening to a Recorded Message](#)
- [Implementing Your Project Menu](#)

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 an overall goal.

[Table 11-1](#) describes each project menu type.

Table 11-1 *Project Menu Types*

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 data structure as a standard menu.

Table 11–1 (Cont.) Project Menu Types

Menu Type	Description
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 that 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.

Menu types are like building blocks for constructing features or routing solutions in your contact center. For more information about how you can use menus to provide a customer with the account balance without using agent intervention, see [Table 11–2](#).

Table 11–2 Menus That Provide an Account Balance Without Using Agent Intervention

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: <i>Welcome to the contact center. Please enter your account number.</i> 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 the account number 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.
(No action).	The Play Value menu plays a prompt, such as <i>Your current balance is,</i> 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, <i>four hundred and twenty three dollars.</i>

As described in the example ([Table 11–2](#)), each menu does 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

Administration Manager has user-defined variables and system variables. You can use both types of variables in each menu type to:

- Share values between project menus
- Collect and store values that customers enter in a menu
- Add values to and store values coming back from an SQL query

About 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.

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, no other action is required 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.

Note: All variable names must begin with a dollar sign (\$) (for example, \$CustPhone. Variable names are case sensitive. So, \$custPhone is not the same variable as \$CustPhone.

About Identifying User-Defined Variable Types

Oracle Contact On Demand can handle variables as either integers or strings. You must enclose a variable with single quotes, so that it can be treated as a string. For example, Oracle Contact On Demand 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 Oracle Contact On Demand creates a variable during a call, the variable continues to exist for the life of the call. When the call ends, the variable is erased from memory.

Note: You can share variables between menus, but only for the same interaction.

Consider the following examples:

- If Oracle Contact On Demand routes a call from one menu to another, it 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, Oracle Contact On Demand routes both calls to a project menu. The project menu creates a variable called \$Account_Number. Because there are two interactions, the project menu keeps the value of \$Account_Number for the first interaction separate from the value of \$Account_Number for the second call.

About Length of a User-Defined Variable Name

Theoretically, variable names can be any length. However, because Oracle Contact On Demand can pass variables between data systems, it is best to keep the variable names reasonably short. For example, you can include variables in SQL queries, but because databases have difference requirements for the maximum query length, a long variable name might result in an error message.

About System Variables

In addition to creating your own variables, Oracle Contact On Demand also provides many system variables that you can use. System variables have values that are automatically set. [Table 11-3](#) describes the system variables.

Table 11–3 System Variables

System Variables	Description
\$ACD_PRIORITY	Initially this variable is set to the priority of the project, which is set in the Priority list box. If you enable Customer Priority Routing, Oracle Contact On Demand can change the value of this variable to the customer priority. For more information on variables, see "About Assigning Priority Levels to Customers" on page 17-1.
\$ANI	The current incoming phone number.
\$CID	If your project prompts the customer for the customer ID, 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 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. This variable has a POSIX timestamp format (the number of seconds since Midnight, January 1, 1970, UTC/GMT.)
\$INTID	The ID of the current interaction.
\$SQLSTATUS	The status of the last query executed from an SQL Query project menu. For more information on SQL Query menus, see "Creating SQL Query Menus" on page 11-17. The possible values are: <ul style="list-style-type: none"> ■ FAIL ■ NO-ROWS ■ PENDING ■ SUCCESS
\$TODAYSDATE	Stores the current date in the format YYYYMMDD.

Operators

Operators allow you to manipulate variables in a project menu:

- Numeric and string operators
- Comparison operators

[Table 11–4](#) describes the various numeric and string operators.

Table 11-4 Numeric and String Operators

Operators	Description
Numeric Operators	
+	Add values.
-	Subtract values.
*	Multiply values.
/	Divide values.
String Operators	
+	Concatenate strings.

Note: You can use numeric and string operators in any menu location except the Case tab. For more information on operators, see ["Defining Routing Actions"](#) on page 11-13.

Use Comparison Operators (also called logical or test operators) to test conditions, such as, is variable A equal to variable B? For a list of comparison operators, see [Table 11-5](#).

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. For example, \$Balance=5 indicates to assign the variable \$Balance the value of 5, and \$Balance==5 indicates to compare the value of \$Balance to 5. (Is the value of \$Balance equal to 5?)

Table 11-5 Comparison Operators

Comparison Operators	Description
==	Equal to
!=	Not equal
>	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 Oracle Contact On Demand 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 Navigation pane, click Options, Project Menus, and then Add.
The Project Menus screen opens to the Menu tab.

2. In the Menu tab, click Standard.

3. Complete the fields in the Menu tab.

The following table describes the fields.

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. For more information on prompts, see "Creating a Custom Prompt" on page 7-2.
Allow caller to select extension	Select this option to allow the caller to enter an agent's extension. Also select the Allow Type-ahead box, so that the customer can type an agent's extension, without listening to the entire menu.
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 Apply or OK to save the menu. You must save the menu before navigating to Touch-Tones tab.
5. Click the Touch-Tones tab where you associate a customer key press with a routing action:
 - 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, Oracle Contact On Demand disconnects the user.
 - Click Timeout Action to specify an action to take if the caller does not make a choice from the menu. You specify the number of times the menu repeats without any user action.

After this number is reached, Oracle Contact On Demand performs the action associated with the Timeout Action button.
 - Click Default Link 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.
6. Use the information in the following table to create your own tone and event routing.

Tone/Event	Routes Caller to	Description
Invalid Entry		Select this option to play the system prompt <i>invalid.wav</i> (Invalid Entry).
Workgroup		<p>Select this option to route the caller to the workgroup specified in the list box. Then, click either:</p> <ul style="list-style-type: none"> ▪ Route to Workgroup extension. Select this option to transfer the call to the best available agent. If no agent is available, Oracle Contact On Demand 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: <i>Press 3 to send a fax.</i> Then, when the user presses 3 (for example), the fax tone becomes audible and the user can send a fax. Oracle Contact On Demand routes the fax to the best available agent. If no agent is available, it places the fax in a queue. When an agent accepts the fax interaction, Oracle Contact On Demand sends the agent an email with the fax as a TIFF attachment.
Script		Choose a script to display to the agent whenever Oracle Contact On Demand routes a call to that agent. For more information on scripts, see " Adding or Editing a URL Library " on page 6-51.
FAQ		Choose an FAQ to display to the agent whenever Oracle Contact On Demand routes a call to that agent.
Extension		<p>Select this option to route the caller to the agent specified in the list box. Then select one of the following:</p> <ul style="list-style-type: none"> ▪ Route to Agent Extension. Select this option to route a call to the agent. ▪ Route to Agent Fax. Select this option 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		<p>Select this option to transfer the caller to your custom Interactive Voice Response (IVR) system. Type the name of your IVR Server in the field.</p> <p>Note: This option appears only if your version of Oracle Contact On Demand is configured to support a custom IVR Server.</p>
Menu		<p>Use this option to transfer your caller to another project menu:</p> <ul style="list-style-type: none"> ▪ Select the project menu from the Menu list. ▪ Select a language from the Select Language 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 list. ▪ If you are routing the customer to a menu in a different language, choose that language in the Select Language list.
Plus button		Click Plus to quickly add a new project menu without leaving the Touch Tones tab. For more information on project menus, see " Adding a New Project Menu in the Touch-Tones Tab " on page 11-9.
Go button		Click Go to quickly switch from one project menu to another. For more information about project menus, see " Switching from One Project Menu to Another Using the Touch-Tones Tab " on page 11-9.
Disconnect		Select this option to disconnect the caller.

Tone/Event Routes Caller to	Description
Company Directory	<p>Select this option to play the prompt entername.wav: <i>Please enter the last name of the person you wish to reach using your touch-tone telephone keypad...</i></p> <p>This feature also allows the caller to navigate to an agent by entering the first three letters of the agent's last name.</p>
Mailbox Manager	<p>Select this option to play the following prompt entermailbox.wav and allow contact center agents to access their non-ACD voice mail messages from a remote telephone and to set up their voice mail greetings: <i>Please enter your mailbox number, followed by the pound key.</i></p> <p>For agents to access the Mailbox Manager remotely:</p> <ul style="list-style-type: none"> ■ The agent's user name and password must consist only of numbers. For example, the agent's user name might be 1234 and the password might be 5678. ■ You must have a POP3 Server configured for the agent. ■ 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 Oracle Contact On Demand users to access their ACD voice mail messages. If you do not want customers to access the Mailbox Manager feature, leave it out of your recorded prompt. Instruct your agents that they can enter a key to access their voice mail messages, but the feature will not be described as an option in the recorded prompt.
Agent Voice Mail	<p>Select this option so that Oracle Contact On Demand will play only your menu before routing a customer to an agent's voice mail.</p> <p>For example, if the customer calls a phone number associated with a project, Oracle Contact On Demand will route the customer to an agent. However, if the agent is not available, the customer is routed to the agent's voice mail.</p> <p>With this option selected, Oracle Contact On Demand plays a menu before the customer can leave a voice mail. The menu, for example, can instruct the customer to press a specific key to allow the customer to leave a voice mail for the agent.</p> <p>Note: If you use the Agent Voicemail button in a menu that is not played for a customer before the customer leaves a voice mail, Oracle Contact On Demand cannot determine which agent voice mail to use.</p>
Login to ACD Voice Mail	<p>Select this option to allow agents, supervisors, administrators, and other users of Oracle Contact On Demand to dial in and retrieve their ACD voice mail:</p> <ul style="list-style-type: none"> ■ Oracle Contact On Demand users dial the number that you provide. ■ Your project menu routes the Oracle Contact On Demand user to the Login to ACD Voice Mail option. ■ A prompt plays giving the Oracle Contact On Demand users several options; one of which is to listen to their ACD voice mails. <p>Note: Use this option for agents, supervisors, administrators, and anyone using Oracle Contact On Demand to retrieve their ACD voice mails from a phone. Typically, Oracle Contact On Demand users are not logged in to Interaction Manager.</p> <p>You can also allow Oracle Contact On Demand users to access their non-ACD voice mail messages.</p>
Campaign	<p>Select this option to route a call to a campaign. For more information on campaigns, see Chapter 12, "Overview of Campaign Management."</p>

Tone/Event	Description
Routes Caller to	
External Transfer	Select this option to transfer the call to the specified external phone number. Note: You cannot use an internal phone number or extension. Oracle Contact On Demand does not track calls that are transferred to an external number. This call will not appear in reports.
Supervised By	The Supervised By feature allows you to select someone to listen in as a third party on the call. For example, when a student calls 911, you can set the Supervisor By feature to allow a campus security agent to listen in on the 911 call when the project menu transfers the call to outside (police).
Change Project	Select this option to route the caller to the specified project.
And Play Prompt	Click and select a prompt (from the list) so that Oracle Contact On Demand will play a prompt before taking any routing action. For example, if you select Change Project, then use this prompt to notify callers, <i>I am transferring you to the sales group</i> . Callers hear this prompt before the call is routed.
Set Variable	Use the Set Variable control to perform these actions before Oracle Contact On Demand routes the call: <ul style="list-style-type: none"> ■ Create variables. ■ Set the value of the new and existing variables. ■ Test the value of the variables.

7. Repeat Steps 5 and 6 of this procedure until all actions are set for all of the allowed key presses, and then click OK.

Adding a New Project Menu in the Touch-Tones Tab

While in the Touch-Tones tab, you can add a new Project Menu without using the Project Menu option, by doing the following task.

To add a new project menu in the Touch-Tones tab

1. In the Touch-Tones tab, click the Plus icon.
A message box appears.
2. In the Menu Name field, type the name of a new Project Menu and then click the Add button.

Administration Manager creates a new Project Menu with the name you entered. The new Project Menu is automatically selected in the Menu list and has the following default values:

- Prompt is None
- Menu Type is Standard
- Number of Retries Before Disconnect is 3
- Wait Time Before Disconnecting is 10 seconds

Switching from One Project Menu to Another Using the Touch-Tones Tab

Complete the steps in the following procedure to switch from one Project Menu to another while using the Touch-Tones tab.

To switch from one project menu to another using the Touch Tones tab

1. Select a menu from the Menu list.
2. Click Go.

A message box appears asking for confirmation to go to the selected menu.

3. Click OK.

Administration Manager does the following:

- Closes your current project menu
- Opens the project menu you choose

Note: 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. Oracle Contact On Demand 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 of Creating a Variable and Setting Its Value

The following example describes how to create a variable and set its value to 5.

To create a variable and set its value to 5

1. Click the Plus icon.
2. In the Set Variable window, 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 of 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 the Plus icon.
2. In the Set Variable window, type `$tmp`.
3. Click Value, and type `$tmp + 1`, and then click OK.

Example of Assigning a Company Prompt ID to a Variable

In some situations, when you are constructing a menu it is convenient to store the ID number of a company prompt in a variable. When the ID of a Company Prompt is defined 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 the Plus icon.
2. In the Set Variable window, type `$invalid`.
3. Click Play Prompt.
4. Select Invalid Entry from the Play Prompt list, and then click OK.
5. After assigning the ID of a Company Prompt to a variable, play that prompt to a caller by routing to a Play Value menu, and then entering your variable (`$invalid`) in the Add Play Value window.

Example of 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, Oracle Contact On Demand routes them to an English-speaking workgroup. If they choose to continue in Spanish, they are routed 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:
 - In the Menu tab, click Standard.
 - In the Touch-Tones tab, click the Default Link button, click the Workgroup button, and then select the Spanish workgroup from the list.

Oracle Contact On Demand immediately transfers any customer who is routed to the Spanish menu to your Spanish workgroup.
4. Create an English menu:
 - In the Menu tab, select the Company Prompt you created from the Prompt list, and click the Standard button.
 - In the Touch-Tones tab, click 1, click the Workgroup button, and then select the English Workgroup from the list.

Oracle Contact On Demand immediately transfers a customer who presses 1 to the English workgroup.

 - In the Touch-Tones tab, click button 2, click the Menu button, select the Spanish Menu from the list and then select Spanish from the Select Language list.

Oracle Contact On Demand immediately transfers a customer who presses 2 to the Spanish workgroup. All further prompts that the customer hears (for example, if he or she is waiting in a queue) will be in Spanish.

5. Do the following:
 - Create a project.
 - Route the phone calls to the English Menu. Click Options, Projects, Phone tab, click the Menu button, and then select the English menu from the list.

Oracle Contact On Demand 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 system prompts for all project options and all workgroup options are recorded in that language.

If you select a menu in a specific language, and you do not have prompts in that language, callers will not hear a prompt when they reach that menu. For more information on creating prompts, see "[Creating a Custom Prompt](#)" on page 7-2.

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 Administration Manager, this tab works more like an IF... THEN... ELSE... statement. The following options are available:

- **Access to variables.** In the Case tab, access is provided to all system variables and all variables created for the current interaction. For more information on variables, see "[Using Variables in Menus](#)" on page 11-2 and "[About the Scope of User-Defined Variables](#)" on page 11-3.
- **Number of conditions.** You can create as many conditions or tests as you want. Oracle Contact On Demand executes the first condition that is true.
- **Default routing action.** You can create a default routing action (using the Other button). Oracle Contact On Demand takes this routing action if none of your conditions are true.
- **Use of operators.** The conditions that you create must use only the comparison (logical) operators. For more information on operators, see "[Operators](#)" on page 11-4.

Caution: Do not use any of the numeric or string operators in the Case tab, because the Case tab is not used for arithmetic operations like: `$variable1 * $variable2`, or for setting the value of a variable: `$variable1 = 5`.

The Case tab 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 click the Case tab.

The Case tab screen opens.

2. Click Plus to add your condition or test.
3. In the window that appears, type your condition, and then click OK.

The screen refreshes showing additional options.

4. On the right side of the screen, select a routing action that Oracle Contact On Demand takes when your condition is true.

In this example, you create a condition or test that checks the customer's account balance. The variable \$accountBalance was created, and the value set in some other menu.

First, you create the condition or test `$accountBalance < 1000`. Then, select a routing action for that condition. When the customer's account balance is less than \$1000.00, Oracle Contact On Demand routes the call to a menu called Balance Too Low. This menu might inform the customer that the balance is below \$1000.00 and that a service fee will be charged.

5. Repeat Steps 3 and 4 until all of the conditions and routing actions are added.
6. As an option, you can create a default routing condition that Oracle Contact On Demand executes if none of your other conditions is true:
 - Click Other.
 - 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. Complete the fields.

The following table describes 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. For more information, see "Creating a Custom Prompt" on page 7-2.
Number of Digits	The number of digits to be entered by the caller Note: This number includes any terminating key 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. For more information on variables, see "About User-Defined Variables" on page 11-3.
Do Not Retain User Entered Digits	If this option is not selected, Oracle Contact On Demand keeps the numbers that the user enters in the input variables (identified in the Store User Input in the Variable field).
Validate	Select this option so that callers can verify that their data is correct. The caller can select 1 for approval or 2 to reenter the data.
Terminator	Select this option to allow the caller to enter a terminating key. A terminating key is a way that the caller indicates to Oracle Contact On Demand: I have finished entering the information you asked for. For example, you might ask the caller to enter an account number, and then press the number sign (#) key as a terminating key. A terminating key is useful if the caller's information might be of different lengths. For example, some account numbers are longer than others.
Number of 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 Oracle Contact On Demand waits before replaying the menu prompt.

4. Create your routing actions using either the Touch-Tones tab or the Case tab, and then click OK.

For more information on the Touch-Tones tab, see ["Creating Standard Menus"](#) on page 11-5, and for more information on the Case tab, see ["Defining Routing Actions"](#) on page 11-13.

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 Value.
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 list that describes the options offered in this menu. For more information on prompts, see "Creating a Custom Prompt" on page 7-2. Note: If the correct prompt does not appear in the list box, you must record it, and add it to the Prompt library.

4. Add the Play Value Options.

The Play Value Options area is where you select the prompts or values to play to the customer.

5. Click the Plus icon.

The Play a Prompt or Value window appears.

1. To play a prompt to the caller:

- Click Prompt.
- Select the prompt from the Select Prompt list.

Note: You can play only company prompts to callers. You cannot play system prompts. For more information about creating company prompts, see ["About Custom Company Prompts"](#) on page 7-2.

2. To play a value (the contents of a variable):

- Click Value.
- In the Select the Variable field, type the name of the variable with the 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. For more information on menus, see ["Adding a New Project Menu in the Touch-Tones Tab"](#) on page 11-9.

- From the As list, choose the way the caller hears the value.

The following table describes the values and the prompts that your callers hear.

Value	What Callers Hear
Currency	If the value of your variable is 12345 or '123.45', in English, the caller would hear: <i>One hundred twenty three dollars forty-five cents.</i> The value will be spoken according to the selected language for the interaction.
Number	If the value of your variable is 12345, the caller hears: <i>Twelve thousand three hundred and forty-five.</i> The value will be spoken according to the selected language for the interaction.

Value	What Callers Hear
Spelling	<p>If the value of your variable is 12345, the caller hears: <i>One, two, three, four, five.</i></p> <p>The following characters are available for spelling prompts:</p> <ul style="list-style-type: none"> ■ Digits. 0-9 ■ Letters. A-Z ■ Special Characters. ~!@#\$\$%^&*()_+={} []\.;'"<>?.,/~
Date (yyyymmdd)	<p>If the value of your variable is 20100710, in English, the caller hears: <i>July 10th, two-thousand ten.</i></p> <p>The specific order of the date elements (month, day, and year or day, month, and year) will depend on the selected language.</p> <p>Note: It is assumed that the variable is a date in the format yyyymmdd.</p>
Date (1023476575 seconds since 1970)	<p>If the value of your variable is 20100710, in English, the caller hears: <i>July 10th, two-thousand ten.</i></p> <p>The specific order of the date elements (month, day, and year or day, month, and year) will depend on the selected language.</p> <p>Note: It is assumed that the variable has a POSIX formatted date (number of seconds since 1970).</p>
Date at Time (1023476575 seconds since 1970)	<p>This Date at Time value is the same as the preceding row, but also tells the caller the time.</p>
Time (1023476575 seconds since 1970)	<p>If the value of your variable contains the POSIX equivalent of 10:35 A.M., in English, the caller hears: <i>Ten thirty-five, A.M.</i></p> <p>The spoken value of time and whether a 12-hour or 24-hour clock is being used, is dependent on the selected language.</p> <p>Note: It is assumed that the variable contains a POSIX time value.</p>
Time (HHmm)	<p>If the value of your variable is 1035, in English, the caller hears: <i>Ten thirty-five, A.M.</i></p> <p>The spoken value of time and whether a 12-hour or 24-hour clock is being used, is dependent on the selected language.</p> <p>Note: It is assumed that the variable contains a time value in the 24-hour format HHmm.</p>
Prompt	<p>Oracle Contact On Demand plays the prompt to the caller.</p> <p>Note: It is assumed that the variable contains the ID of a company prompt. For more information on variables, see "Example of Incrementing a Preexisting Variable" on page 11-10.</p>

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. For more information on prompts, see "[Adding or Editing a Company Prompt Library](#)" on page 6-30.
3. Create your routing actions using either the Touch-Tones tab or the Case tab, and then click OK.

For more information on the Touch-Tones tab, see "[Creating Standard Menus](#)" on page 11-5, and for more information on the Case tab, see "[Defining Routing Actions](#)" on page 11-13.

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, contact your network administrator:

- You can include both system variables and user-defined variables in your SQL queries. Oracle Contact On Demand 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 (\$).

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 computer where the Oracle Contact On Demand Statistics Server is installed.

To create SQL Query Menus

1. In the 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 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. For more information on prompts, see " Creating a Custom Prompt " on page 7-2.
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, and then click OK.

For more information on the Touch-Tones tab, see "[Creating Standard Menus](#)" on page 11-5, and for more information on the Case tab, see "[Defining Routing Actions](#)" on page 11-13.

Example of Creating Query Tables

You can create query tables to pass values to Oracle Contact On Demand for specific purposes. You can, for example, create a query table to update a customer's status or return the customer's account balance.

Updating a Customer's Status

You update a customer's status by updating an existing table.

Use the following statement to update a customer's status:

```
UPDATE Customers SET CustStatus = $NewStatus
WHERE CustId = '$CustomerId'
```

Oracle Contact On Demand 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.

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, you must provide a user-defined variable for each column to collect information:

```
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 might provide only the variables for the first row. Administration Manager 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
```

Table 11–6 shows your result table.

Table 11–6 Result Table

First	Last
Rod	Beck
Adam	Eaton

Table 11–6 (Cont.) Result Table

First	Last
Miguel	Djeda
Ryan	Klesko
...	...

Administration Manager sees that your result table has multiple rows and automatically creates a set of variables to access the data in each row as shown in [Table 11–7](#).

Table 11–7 Variables for Rows

User	Variable	User	Variable
Rod	\$fname_1	Beck	\$lname_1
Adam	\$fname_2	Eaton	\$lname_2
Miguel	\$fname_3	Djeda	\$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). Administration Manager 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 variable structure 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 Oracle Contact On Demand 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 following format:

```
$variable_name@$index_variable
```

In the previous example, you reference Ryan Klesko as follows:

```
$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 Navigation pane, click Options, Project Menus, and then Add.
2. In the Menu tab, click Record.
3. Complete the fields on the Menu tab.

The following table describes the fields.

Field	Description
Menu Name	Type a name for this menu.
Description	Type the menu's function or purpose.
Prompt	Select the prompt from the 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. For more information on prompts, see "Creating a Custom Prompt" on page 7-2.
Store filename in variable	<p>When your Record menu captures a customer message, the message is stored in a .wav file on an Oracle Contact On Demand Server. Oracle Contact On Demand automatically generates a name for the .wav file, but you can find the name by entering a variable in this field. For example, you create a Record menu that captures a customer message. The message is stored in a .wav file with the generated name 412117512.wav. In the Store Filename in Variable field, enter \$RecordFileName.</p> <p>After Oracle Contact On Demand captures the customer's message, the value of the variable \$RecordFileName becomes 412117512.wav.</p> <p>The scope of a variable is the interaction.</p>
Validate	If this option is selected, a recording is played for the customer, which provides the option to listen, rerecord, cancel, or save the message and continue.
Terminator	If you select a terminating key, Oracle Contact On Demand asks the caller to press a button to indicate that the caller has finished the recording. Without a terminating key, the recording continues until the caller hangs up, or until the maximum recording length is reached.
Maximum recording time	The maximum time that the recording continues.

4. Create your routing actions using either the Touch-Tones tab or the Case tab, and then click OK.

Listening to a Recorded Message

You can listen in two ways to a message that was already captured by a Record menu:

- **Interaction Manager.** If a contact was assigned to the interaction, the recorded message will appear as a link in the Interaction History for the Contact. For more information on recordings, see *Oracle Contact On Demand Interaction Manager Guide*.
- **Supervision Manager.** Regardless of whether Oracle Contact On Demand assigned a contact to the interaction, the recording is always available to Supervision Manager. For more information on recordings, see *Oracle Contact On Demand Supervision Manager Guide*.

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. For more information on menus, see ["Process of Adding Phone Interactions to a Project"](#) on page 15-3.

Overview of Campaign Management

This chapter provides an overview of campaign management and its components. Campaign management is used to create the sophisticated call routing for interactive phone systems. For more information about the tasks you must perform to construct the call workflow, see [Chapter 13, "Working with Campaigns"](#) and [Chapter 14, "Working with Campaign Manager Features."](#)

This chapter includes the following topics:

- [About Campaigns](#)
- [Guidelines for Designing Campaigns](#)
- [About Campaign Support Resources](#)
- [About Nodes](#)
- [About the Campaign Wizard](#)

About Campaigns

Campaigns are called a workflow. 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 workflow of the parent node.

Oracle Contact On Demand automatically creates a child default node when:

- You set an action on a node.
- You route the call to another node.

Oracle Contact On Demand creates a child default node to ensure that, no matter what happens, the call always routes somewhere. The default node instructs Oracle Contact On Demand as to what to do, when none of the conditions are met.

If you delete a default node, and the customer does something unexpected, Oracle Contact On Demand routes the call to a special setting called, In Case of Any System Error, Go To. You select the setting when you create a campaign. For more information on menus, see ["About Setting Actions"](#) on page 14-1.

You create a campaign (call workflow) to do the following:

- 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 Campaign Types

There are two types of campaigns in Oracle Contact On Demand:

- **Draft Campaign.** A development version of a campaign for experimentation and testing, without making it available for public use.
- **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 you 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.

The Campaign feature in Oracle Contact On Demand has two advantages:

- It has a flowchart-like interface, so that when you create a chart of the call workflow, you are simultaneously creating the contact center.
- Most (and in some cases, all) of the components of the call workflow 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 workflow in a single object.

Guidelines for Designing Campaigns

Because campaigns can be lengthy and complex, the best approach is to follow these guidelines:

1. Create a call workflow diagram. Continue to add additional workflow diagrams (or create a series of call workflow charts) to illustrate a complex call workflow as it moves through Oracle Contact On Demand.
2. Create all of the components to support the call workflow (including resources, menus, prompts, SQL queries, and so on).
3. Link all of those components together to create the campaign, using the Campaign Wizard.
4. Associate or route your campaign from either a phone project or project menu.
5. Deploy the campaign.

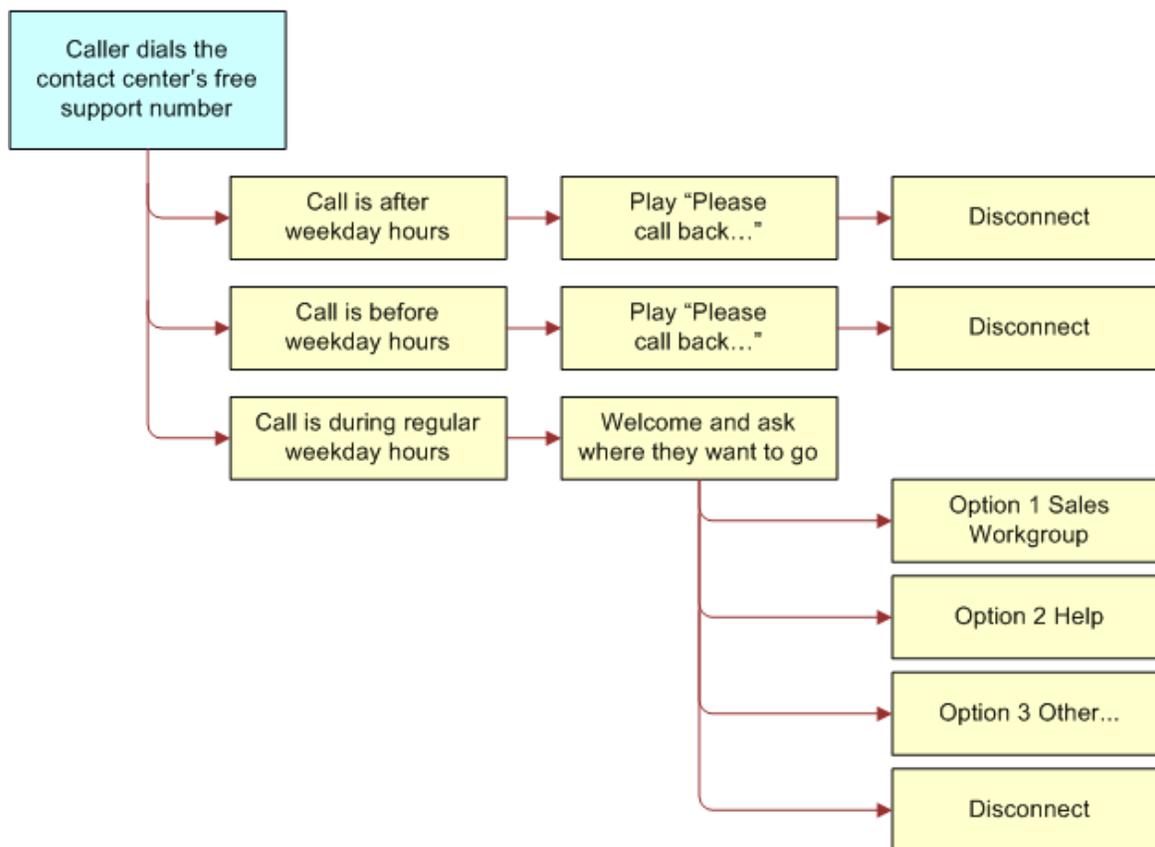
Example of Call Workflow Diagram

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 presses. The sequence of events in the call workflow is as follows:

- Identify the default condition for the campaign if the action that you selected for this step fails.
- Ask the customer to choose English or Spanish.
- Capture the customer's entries.
- Route the call to the correct workgroup (English-speaking or Spanish-speaking workgroup).

Figure 12-1 shows an example call workflow for this campaign. This figure shows that the time a caller calls a contact center determines the message the caller receives. If the caller does not call during regular business hours, the caller is asked to call back, and is then disconnected. If the caller calls during regular business hours, the caller is asked to select an option.

Figure 12-1 Call Workflow for a Campaign



About Campaign Support Resources

Create support resources, and stores them in the various libraries in Administration Manager.

For example, do the following:

- Create a prompt asking the caller to select a language, and store the prompt in the Prompt library.
- Create an English-speaking workgroup and a Spanish-speaking workgroup, where the campaign will direct the calls.

About Nodes

A node is similar to a block in a flowchart, it provides a graphical representation of the workflow and order of a process. In Oracle Contact On Demand, the nodes that are used in Campaign Management chart the call workflow and dictate the behavior of the call workflow.

There are three types of nodes in Oracle Contact On Demand, they are: Begin node, Menu Type nodes, and Action Menu Type nodes.

You can perform three main tasks 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. For example, in one node, ask the customer to enter the account number, capture the number that the customer enters, and then verify that the account number exists in your Oracle Contact On Demand database. For more information on actions, see "[Adding Actions to Nodes](#)" on page 14-1.
- **Route to a child node if some condition occurs.** Select this option only if some conditions occur. From an action type node, for example, if the customer presses 2 to continue in Spanish, you can route the call to another node that plays a Spanish menu, and do further call workflow from that menu. Routing the call to a child node is one way to create new nodes in your campaign. For more information on conditional routing, see "[Adding a Menu Routing Condition](#)" on page 13-14.
- **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 Administration Manager (such as a project or workgroup). So, this routing is similar to a GoTo statement in programming. For more information on routing, see "[About Menu Type Routing](#)" on page 14-9.

About the Begin Node

When you create a new campaign, you always start with the begin node, which Oracle Contact On Demand creates automatically. The begin node 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
- Entry point into the campaign

Note: Every campaign must have a begin node. The begin node is the only node that you cannot delete.

About Menu Type Nodes

Menu type nodes are used to route the call workflow to existing campaign objects that are created in Administration Manager, or to existing nodes within the campaign. For more information on defining Menu Type nodes in a call workflow, see "[About Menu Type Routing](#)" on page 14-9.

Caution: When routing to an object (instead of to another node), the workflow moves outside the control of the campaign. Thus, menu type nodes cannot have child nodes.

About Action Menu Type Nodes

Action menu type nodes are used to perform an action and then return values to the campaign, so that the campaign can perform routing decisions. Action type nodes are

used to build segments of the call workflow, play prompts, gather digits from callers, execute queries, set parameters for workgroups, and so on. For more information on defining Action Menu Type nodes in a call workflow, see "[About Setting Actions](#)" on page 14-1.

About the Campaign Wizard

The process of creating a campaign (call workflow) in Oracle Contact On Demand is comprised of two parts: using the Campaign Wizard to create and name the campaign, and using the Campaign Editor to define the nodes of the workflow. For more information on creating a campaign, see "[Creating a Simple Campaign Using the Campaign Wizard](#)" on page 13-7. For more information on nodes and node types, see "[About Setting Actions](#)" on page 14-1 and "[About Menu Type Routing](#)" on page 14-9.

Working with Campaigns

This chapter describes how to create campaigns. It includes the following topics:

- [Process of Defining the Call Workflow](#)
- [Process of Deploying a Simple Campaign](#)
- [Managing Campaign Nodes](#)
- [Working with Menu Routing Conditions](#)
- [Changing Campaign Default Settings](#)

Process of Defining the Call Workflow

Perform these tasks to define a call workflow:

- ["Creating Support Resources" on page 13-1](#)
- ["Creating a Business Event" on page 13-2](#)
- ["Creating Prompts" on page 13-3](#)
- ["Creating Workgroups" on page 13-3](#)
- ["Linking Resources in Campaign Manager" on page 13-4](#)

This process is a step in the ["Roadmap for Configuring the Integration between Oracle Contact On Demand and Oracle CRM On Demand"](#) on page F-13.

Creating Support Resources

This topic describes how to create support resources and stores them in various libraries in Administration Manager.

This task is a step in the ["Process of Defining the Call Workflow"](#) on page 13-1.

To create support resources

1. Build three business events:
 - One for regular business hours
 - Two for after hours (8 P.M. to 12 A.M. and 12 A.M. to 8 A.M.)

For more information on creating business events, see ["Creating a Business Event"](#) on page 13-2.
2. Create a prompt providing the business hours, and store the prompt in the Prompt library.

For more information on creating prompts and the Prompt library, see "[Creating Prompts](#)" on page 13-3 and "[Adding or Editing a Company Prompt Library](#)" on page 6-30.

3. Create a Welcome prompt asking where the caller wants to be directed.

For more information on creating prompts, see "[Creating Prompts](#)" on page 13-3.

4. Create a workgroup.

For more information on creating workgroups, see "[Creating Workgroups](#)" on page 13-3.

Creating a Business Event

This topic describes how to create a business event.

This task is a step in the "[Process of Defining the Call Workflow](#)" on page 13-1.

To create a business event

1. From the Navigation pane, click 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 the Plus icon.

The Define Sub Event window opens.

3. In the Define Sub Event window:

- Type a name in the Sub Event Name box (such as Regular Weekday Hours).
- Under Schedule Event, click Weekly to add weekly events.

4. Click Monday through Friday and then click the following:

- **From.** Select 8 hrs. and 0 mins.
- **To.** Select 10 hrs. and 0 mins.

5. Click OK.

The Regular Weekly Hours business sub 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 Steps 2 through 6 to create a second business event for before the business opens (12 A.M. to 8 A.M.).

8. Click Add, and repeat Steps 2 through 6 to create a third business event for after business hours (8 P.M. to 11:59 P.M.).

The Business Events list displays three events.

9. Click OK.

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 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.

This task is a step in the "[Process of Defining the Call Workflow](#)" on page 13-1.

To create prompts

1. From the Navigation pane, click Libraries, Company Prompts, and then Add.
The Company Prompts screen opens.
2. Type a name for the prompt in the Prompt Name field (such as Business Hours).
The name that you enter appears in the prompt list when you set Administration Manager 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 field, type a description of the prompt.
This description appears in the prompt list when you set Administration Manager 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. (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 Steps 2 through 7 of this procedure for all of the prompts you require for this campaign.
The new prompts are stored in the Oracle Contact On Demand database.

Creating Workgroups

Create a sales workgroup to which you route the call during regular business hours. Create the workgroup. For more information on creating workgroups, see "[Adding or Editing a Workgroup](#)" on page 10-2.

This task is a step in the "[Process of Defining the Call Workflow](#)" on page 13-1.

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, you would present another option, the caller hears the first Welcome prompt, and:

- 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.

Setting Up a Workgroup Callback

Using the Actions Menu, you can set up a workgroup callback outside the normal workgroup functionality.

To set up a workgroup callback

1. Play a prompt asking for the caller's country code.
2. Using the Get Digits function, set the function for two digits, with a number sign (#) terminating key and then, save the setting as variable #X.
3. Play a prompt asking for the caller's area code and telephone number.
4. Using the Get Digits function, set the function for 11 digits (the phone number and the terminating key) and then, 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 list.

Note: When the caller finishes entering the final number, the call is terminated.

Linking Resources in Campaign Manager

Assuming you already created the library resources, follow this procedure to create a campaign to route the calls through business events to a simple campaign. After you create your own company-specific resources, you can insert them into your campaign, using the Campaign Wizard.

This task is a step in the "[Process of Defining the Call Workflow](#)" on page 13-1.

To link resources in Campaign Manager

1. In the 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 the default actions to take if the customer does something unexpected and, for some reason, a default node (condition) does not exist.

Note: Oracle Contact On Demand automatically creates a default node when you create a campaign.

For example:

- a. From the Go to list, select the workgroup that you created.
 - b. From the Select Workgroup list, select English.
4. Click Finish.

The Campaign Workspace opens, showing a Begin node.

5. For example, set an action:
 - a. Right-click the Begin node box.
A menu appears.
 - b. From the menu, select Set Action Menu.
The Set Action menu opens.

Note: You can set many actions for a node. However, to enable both Business Events and Touch-Tone Routing, you must select Get DTMF. For more information on nodes, see "[Adding Actions to Nodes](#)" on page 14-1.

6. Select and drag Get DTMF to the Begin display area (identified by a slightly gray background).
7. Double-click the Get DTMF heading (folder icon) to expand it:
 - a. In the Action Menu Name field, type a name for this step (for example, Step 1).
 - b. In the Number of Retries Before Disconnect/Time-Out field, type 0.
 - c. In the Timeout field, type 5. (Five seconds.)
 - d. Click OK.

The Campaign Workspace is refreshed to show the name of your first node (under the Begin node and a new default node.

8. Identify the business events routing. Click the Plus icon (next to Step 1).
The Menu Routing Conditions window opens.
9. Select Scheduled Event, and then select the option for each event.
10. Click OK.

The Campaign Workspace is refreshed to show a node for each business event, and the default node.

11. Set an action for each node by right-clicking it, and selecting Set Action Menu.
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 example, type Route to Greeting.
 - b. Select Prompt Name and, from the list, select the .wav file that you created and stored in the Company Prompts library.
 - c. Click Allow Caller to Interrupt, which means the caller can make a selection before the prompt finishes.
14. Click and drag Get DTMF to 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 field, type 1.
 - b. In the Timeout field, type 5. (Five seconds between retries.)
 - c. Click OK.
The Campaign Workspace is refreshed 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.
In this example, select numbers 1, 2, and 3.
 18. Click OK.
The Campaign window is refreshed to show two new nodes (one for each selection) and a new default node.
 19. Right-click node 1, and select Set Menu Type from the menu.
The Menu Type box opens.
 20. In the Menu Type Name box, type a name that shows the action you are taking, for example, Option 1 - Route to Sales_Workgroup.
 21. Select Workgroup Extension and then, from the Workgroup Name list, select the Sales_Workgroup that you already created.
 22. Click OK.
The Campaign Workspace is refreshed to show the Route to Sales node name for option 1.
 23. Repeat Steps 20 through 22 for option 2 to route to another workgroup or to an advanced feature.
For more information on campaigns, see [Chapter 12, "Overview of Campaign Management"](#) and [Chapter 14, "Working with Campaign Manager Features."](#)
 24. For both the Before and After Weekday Hours nodes, create a call workflow to the prompt created earlier, which asked the caller to call back during regular business hours. Then, disconnect the call.
For more information on creating prompts, see ["Creating Prompts"](#) on page 13-3.
 25. Before you finish your campaign, configure the default options for each sub-option, or delete them so that the campaign uses the main default option.
 26. Click Close, and then Yes (to the confirmation message).
 27. Associate (route) the campaign with a phone project or a project menu.
For more information on campaigns, see ["Associating the Campaign with a Phone Project"](#) on page 13-10.
 28. Deploy the campaign.
For more information on campaigns, see ["Deploying the Campaign"](#) on page 13-11.

Process of Deploying a Simple Campaign

Perform these tasks to create and deploy a simple campaign:

- ["Creating a Simple Campaign Using the Campaign Wizard"](#) on page 13-7
- ["Associating the Campaign with a Phone Project"](#) on page 13-10
- ["Associating the Campaign with a Project Menu"](#) on page 13-10
- ["Deploying the Campaign"](#) on page 13-11
- ["Deleting a Deployed Campaign"](#) on page 13-11
- ["Creating a Draft Campaign from a Deployed Campaign"](#) on page 13-11
- ["Deleting a Draft Campaign"](#) on page 13-12
- ["Redeploying the Campaign"](#) on page 13-12

This process is a step in the ["Roadmap for Configuring the Integration between Oracle Contact On Demand and Oracle CRM On Demand"](#) on page F-13.

Creating a Simple Campaign Using the Campaign Wizard

This task describes how to create a campaign to select a language. Later, after you create your own company-specific resources, you can insert them into your campaign using the Campaign Wizard. For more information about the Campaign Wizard, see ["About the Campaign Wizard"](#) on page 12-5.

This task is a step in the ["Process of Deploying a Simple Campaign"](#) on page 13-7.

To create a simple campaign using the Campaign Wizard

1. Log in to Administration Manager, and click Options, Campaign, and then Add.

The Java Web Start process begins and, after a few minutes, the Campaign Editor opens the New Campaign Wizard window.

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.

Note: Oracle Contact On Demand automatically creates a default node when you create a campaign.

3. Identify what actions Oracle Contact On Demand takes if an error occurs.

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.

- Select an item from the Go to list.
- Select a workgroup from the list.
- If you want to allow the user to type ahead (that is, to enter a response without listening to the entire prompt), select the option.
- Type a number for the default timeout in seconds, and then click Finish.

The default timeout in seconds is the wait time between key presses.

Field	Description
In Case of Any System Error, Go To:	<p>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 that you select.</p> <p>You can route system errors to one of the following areas:</p> <ul style="list-style-type: none"> ■ Workgroup ■ Workgroup Voice Mail ■ User ■ User Voice Mail ■ Disconnect
Allow Type Ahead	<p>If there is a node (anywhere in the campaign) that plays a prompt, and then captures the user's key presses with a Get User Digit or Get DTMF action, the user can enter a response without listening to the entire prompt.</p>
Inter-Digit Timeout	<p>This option applies at any point in your campaign when you ask the customer to enter multiple key presses.</p> <p>The Inter-Digit Timeout is the wait time between key presses. When the timeout is reached, the campaign moves on to the next action (which might be validating the customer's entry, making a routing decision, and so on).</p>

The Campaign Wizard main menu opens, showing a Begin node. When you create a new campaign, you always start with the Begin node, which Oracle Contact On Demand creates automatically. It represents the first event that you want to happen when people reach your campaign. For more information on nodes, see ["About Nodes"](#) on page 12-3.

Note: The Begin node is the only node that you cannot delete.

4. Set an action for a node as follows:
 - 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 nodes, see ["Adding Actions to Nodes"](#) on page 14-1.
5. Add a Play Prompt action (and assume that the following company prompt has already been created: 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 Actions list, click and drag Play Prompt to the Begin display area.
An action window opens for Play Prompt.
 - c. Double-click the action window to expand it and to show more action options.

Note: In this example for adding a play prompt, you already created a Choose English or Spanish prompt (.wav file). You see prompts in your list only if you already created and added prompts to the Company Prompt library. For more information on prompts, see ["Creating a Custom Prompt"](#) on page 7-2.

- d. Double-click the Play Prompt window, so that the options no longer appear.
6. Capture the data that a caller enters when selecting a language, and store it in a variable.

In this example for capturing the data that the caller enters, 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.

7. Do one of the following:
 - a. 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 field, type 1.
 - b. 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 then click OK.

The Action Menu window closes and the main campaign window becomes accessible again. Notice that Prompt for Languages option appears in the Begin node. Also, notice that there is a child node called Default.

8. In this example, you will set the default node to disconnect if anything unexpected happens.
 - a. Right-click the default node, and select Set Menu Type from the menu. The Menu Type window opens.
 - b. Choose the Menu Type window to route the call to a feature, such as Disconnect, and then click OK. Select Disconnect, and then type a description of this choice in the Name field.

For a description of various menus, see [Chapter 11, "Creating Project Menus."](#)

So far, the sample 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.

Assuming the caller pressed 1 or 2, you must create instructions to route the caller to either the English or Spanish language choice.

9. Route the caller to a child node, based on the key presses that you captured with the Get DTMF action:
 - a. In the Begin node, next to Prompt for Language, click the Plus icon.

The Menu Routing Conditions window opens. For more information about menu routing, see ["About Menu Routing Conditions and Child Nodes"](#) on page 13-14.
 - b. Click DTMF, which lets you set up the routing conditions, based on a user key press.

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.

10. Configure the new nodes. For 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 list, and then click OK.
 - d. Repeat Steps 10 through 13 of this procedure, for the keypress 2 node. Set the language to Spanish.

Note: When you set the language in keypress 1 node and keypress 2 node, the campaign feature automatically creates a default node for each language. 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.

11. Click Close, and then Yes.

You can set up Oracle Contact On Demand to route to the campaign from either a phone project or a project menu.

12. Associate (route) the campaign with a phone project or a project menu.

For more information on campaigns, see "[Associating the Campaign with a Phone Project](#)" on page 13-10, or "[Associating the Campaign with a Project Menu](#)" on page 13-10.

13. Deploy the campaign.

For more information on campaigns, see "[Deploying the Campaign](#)" on page 13-11.

Associating the Campaign with a Phone Project

After creating a campaign, you must route the campaign to a phone project or to one or more project menus within a project. The following procedure describes how to associate the campaign with a project.

This task is a step in the "[Process of Deploying a Simple Campaign](#)" on page 13-7.

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 list.

When a customer calls the project phone number, Oracle Contact On Demand 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 the campaign to a phone project or to one or more project menus within a project. The following procedure describes how to associate the campaign with a project menu.

This task is a step in the "[Process of Deploying a Simple Campaign](#)" on page 13-7.

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 list.

Deploying the Campaign

After creating a campaign, associating it with a project or project menu, you must deploy it within the Campaigns option.

This task is a step in the "[Process of Deploying a Simple Campaign](#)" on page 13-7.

To deploy the campaign

1. In the Navigation pane, click Options, and then select the campaign you want to deploy.
2. Click Deploy, and click then OK in the confirmation message.

Oracle Contact On Demand makes a complete, separate, draft copy of the campaign, and displays it along with the Deploy icon in the Campaign List page.

Note: Because you cannot have two versions of the same campaign deployed at the same time, you must delete the existing deployed version first.

Creating a Draft Campaign from a Deployed Campaign

Complete the following procedure if you made changes to a deployed campaign, and want to overwrite an existing draft version.

This task is a step in the "[Process of Deploying a Simple Campaign](#)" on page 13-7.

To create a draft campaign from a deployed campaign

1. Delete the existing draft version.

For more information, see "[Deleting a Draft Campaign](#)" on page 13-12.

2. Select the deployed campaign, and click Create a Draft Campaign.

Deleting a Deployed Campaign

You cannot have two versions of the same campaign deployed simultaneously. You must delete the existing deployed version. For more information on deploying campaigns, see "[Deploying the Campaign](#)" on page 13-11.

This task is a step in the "[Process of Deploying a Simple Campaign](#)" on page 13-7.

To delete a deployed campaign

1. In the Navigation pane, click Options, and then click Campaign.
2. Select the campaign that you want to delete.
3. Click Delete, and then click OK in the confirmation message.

Deleting a Draft Campaign

You cannot have two versions of the same draft campaign deployed simultaneously. You must delete the existing draft version. For more information on draft campaigns, see ["Creating a Draft Campaign from a Deployed Campaign"](#) on page 13-11.

This task is a step in the ["Process of Deploying a Simple Campaign"](#) on page 13-7.

To delete a draft campaign

1. In the Navigation pane, click Options, and then click Campaign.
2. Select the campaign that you want to delete.
3. Click Delete, and then click OK in the confirmation message.

Redeploying the Campaign

Complete the following procedure if you made changes to a draft campaign and want to overwrite an existing deployed version.

This task is a step in the ["Process of Deploying a Simple Campaign"](#) on page 13-7.

To redeploy the campaign

1. Delete the existing deployed version.

For more information, see ["Deleting a Deployed Campaign"](#) on page 13-11.

2. Select the draft campaign, and click Deploy.

Managing Campaign Nodes

The nodes of a campaign provide the structure and behavior for the call workflow. There are two types of nodes: Action Menu Type and Menu Type.

Adding Nodes and Child Nodes

When creating a campaign, Oracle Contact On Demand 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.

When you first create a campaign, Oracle Contact On Demand automatically creates the first node, called the Begin node. Campaigns can also have parent nodes and the associated child nodes.

To add child nodes

- Add a child node in one of the following ways:
 - Select Set Action Type to perform a specific action (such as play a prompt, capture the customer's key presses, run a query, and so on) by right-clicking a node and selecting Set Action Menu from the menu.

Setting an action on a node automatically creates a child default node. For more information about nodes, see ["Adding Actions to Nodes"](#) on page 14-1.

- 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 by right-clicking a node and selecting Set Menu Type from the menu.

Oracle Contact On Demand creates one child node and a default node for each condition. For more information on nodes, see "[Adding a Menu Routing Condition](#)" on page 13-14.

Note: Node names are not case sensitive. For example you cannot add a node named *Abc* if you already have an existing node named *abc*.

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, Oracle Contact On Demand deletes all of the child nodes as well.

To delete nodes and child nodes

1. In the node that you want delete, click Delete.
2. Click Yes.

Oracle Contact On Demand deletes the parent node and all of the associated child nodes.

About Moving Nodes

You can easily move nodes within a campaign by selecting the node, and then clicking the up or down arrow at the top of the Campaign window. There are however, several restrictions that apply:

- 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 the child nodes move as well.

Note: Oracle Contact On Demand generally executes the nodes in a campaign from top to bottom

Searching for a Node

If your campaign is large, you can find a node by searching for its name. The node name appears in blue text for Action Menu Type 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 field.
Searches are not case sensitive. You can use the asterisk (*) wildcard character. 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 borders of the node.

Working with Menu Routing Conditions

Menu routing conditions allow your campaign to route calls that meet a specific condition. Your campaign can route calls that meet three types of routing conditions:

- **Scheduled Events.** 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. Scheduled events that you create are stored in the Business Events library. You must create the business event before you begin creating your campaign.
- **DTMF.** Your campaign can make a routing decision, which is 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...)`

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)

Adding a Menu Routing Condition

You must set at least one action on a node before you can add a menu routing condition to that node. You cannot add a menu routing condition to 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.

To add a menu routing condition

1. Right-click a node, select Set Action Menu, add an action to the node, and then click OK.

For more information on nodes, see "[Adding Actions to Nodes](#)" on page 14-1.

2. In the Campaign window, find the node that you want to add menu routing, and then click the Plus icon.

The Menu Routing Conditions window 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 Business Event Routing Logic

When you define the call workflow to route to a business event child node, the first child node where the condition is true will be executed. In the example, if the customer calls during business hours, the During Business Hours node will be executed.

However, if someone made a mistake in the hours when creating the business events, so that if a customer calls between 4:00 P.M. and 5:00 P.M., 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 with a condition that was met.

Routing a Scheduled Event (Business Event)

This example describes how to route a scheduled event.

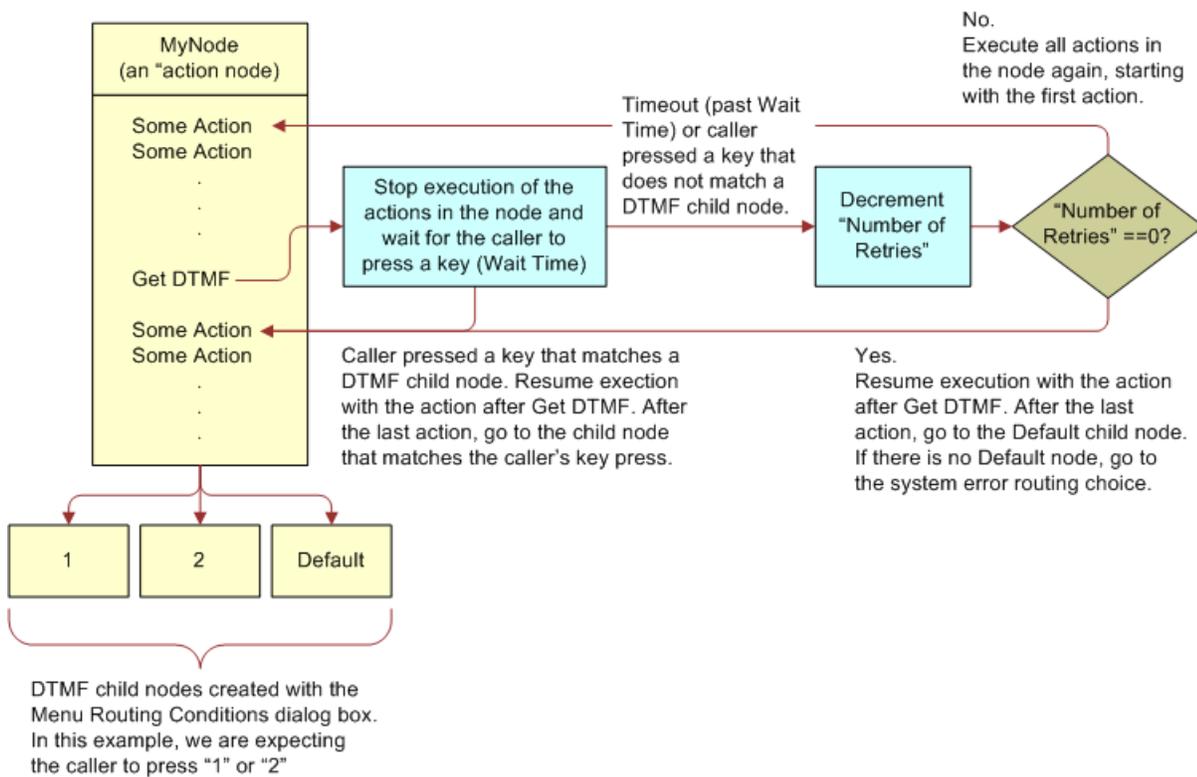
To route a scheduled event

1. Create one or more business events.
For more information on business events, see "[About the Business Events Library](#)" on page 6-53.
2. Select a node where an action has been set.
3. Click the Plus icon of the node.
4. In the Menu Routing Conditions window:
 - a. Select Scheduled Event, then select one or more of the events that you created.
 - b. Click OK to open the main Campaign window.
In the main Campaign window, there is one child node for each business event that you selected, and a default node to handle unexpected conditions.
Usually, you select each node, and set one of the following:
 - c. A menu type to route the call to some feature, such as another campaign.
 - d. An action (or several actions) and possibly some more menu routing conditions.

For more information on menus, see "[Setting a Menu Type](#)" on page 14-9.

About DTMF Routing Logic

[Figure 13-1](#) shows how a node that contains a Get DTMF action is executed, and how a DTMF child node is selected.

Figure 13–1 Execution Logic of the Get DTMF Action

Routing a DTMF

Complete the following steps to define your campaign to make routing decisions based on a customer key press.

To route a DTMF

1. Choose the Action Menu to add a Get DTMF action to a node.

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 capture the caller's key presses. For more information on nodes, see ["Adding Actions to Nodes"](#) on page 14-1.
2. Click Plus on the node.
3. In the Menu Routing Conditions window:
 - a. Select DTMF, and then click one or more of the key press buttons (1, 2, 3, and so on).
 - b. Click OK.

The Campaign window appears.

Notice that there is one child node for each DTMF key press that you selected, and a default node to handle unexpected conditions.
4. Normally, you select each node, and set one of the following:
 - a. A menu type to route the call to some feature (such as another campaign)
 - b. An action (or several actions) and possibly some more menu routing conditions

For more information on menus, see ["Setting a Menu Type"](#) on page 14-9.

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 an action has already been set.
2. Click the Plus icon.
3. In the Menu Routing Conditions window:
 - a. Select Regular Expressions.
 - b. Type a regular expression in the field, 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.

Your regular expressions can use system variables, variables that you created or assigned in some other location in the campaign, and new variables.

Note: Using a variable for the first time creates the variable.

Also, your regular expression can use any of the Oracle Contact On Demand operators. For more information on operators, see ["Operators"](#) on page 11-4.

4. Click OK.
In the main Campaign window, one child node appears for each regular expression that you entered, and a default node to handle unexpected conditions.
5. Normally, you select each node, and set one of the following:
 - a. A menu type to route the call to some feature, such as another campaign
 - b. An action (or several actions), and possibly some more menu routing conditions

For more information on menus, see ["Setting a Menu Type"](#) on page 14-9.

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 the default settings by clicking the Campaign Settings link.
The Campaign Settings box opens. The General tab is displayed, where you can change the name and description of the campaign.
2. Complete the fields in the General tab.
The following table describes the fields.

Field	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. Make your selections in the Advanced tab fields.

The following table describes the fields.

Fields	Description
In Case of Any System Error, Go To:	<p>Set up the routing condition for Oracle Contact On Demand to execute when a system error occurs. You can route system errors to one of the following areas:</p> <ul style="list-style-type: none"> ▪ Workgroup ▪ Workgroup Voice Mail ▪ User ▪ User Voice Mail ▪ Disconnect
Allow Type Ahead	If there is a node (in the campaign) that plays a prompt, and then captures the user's key presses with a Get User Digit or Get DTMF action, the user can enter a response without listening to the entire prompt.
Enter Digit Timeout	<p>This option applies to any location in your campaign where you ask the customer to enter multiple key presses.</p> <p>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 might be validating the customer's entry, making a routing decision, and so on).</p>

Working with Campaign Manager Features

This chapter describes how to configure the behavior of a campaign to include: setting node actions and variables, sending email from the campaign, and running SQL queries. It includes the following topics:

- [About Setting Actions](#)
- [About Menu Type Routing](#)
- [Variables in Campaigns and Reference Fields](#)
- [About System Variables](#)
- [Sending an Email Automatically from a Part of the Campaign](#)
- [Running SQL Queries](#)

About Setting Actions

Actions allow you to define the behavior of the node when they are added to it. You can:

- Give the caller some information.
- Get information from the caller.
- Take action on behalf of the caller.

Adding Actions to Nodes

Complete the following steps to add actions to nodes in the call workflow.

This task is a step in the "[Roadmap for Configuring the Integration between Oracle Contact On Demand and Oracle CRM On Demand](#)" on page F-13.

To add an action to a node

1. Choose Set Action Menu from the submenu of a node.

The Action Menu window opens.

2. Click and drag an option to the Begin 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. Choose 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 Action Menu options.

The options that are available are described in the following table.

Option	Description
Play Variables	<ul style="list-style-type: none"> <li data-bbox="537 342 1365 474">■ Select Variable. Type the name of the variable with the value that will play. For more information on explicit variables and intrinsic variables, see "Variables in Campaigns and Reference Fields" on page 14-11. For more information on what the caller hears when playing variable values, see "Creating Play Value Menus" on page 11-14. Note: The variable must already exist and have a value. <li data-bbox="537 527 1365 695">■ Select Type. Choose the way that the campaign plays the variable value. For example, if the variable value is 12345, then the caller hears: Currency. <i>One hundred twenty three dollars and forty-five cents.</i> Spelling. <i>One, two, three, four, five.</i> Number. <i>Twelve thousand three hundred and forty-five.</i> <li data-bbox="537 716 1365 884">■ Date (yyyymmdd). If the variable value is 20100710, the caller hears: <i>July 10, two-thousand and ten.</i> (This example assumes the variable is in the yyyymmdd format.) Note: The spoken value will depend on the prompt formatting of the language. English will be spoken as described, however, French, Spanish, and so on, will be spoken as 11 November, two thousand ten. <li data-bbox="537 905 1365 978">■ Date (seconds since 1970). If the variable value is 20100710, the caller hears: <i>July 10, two-thousand and ten.</i> (This example assumes the variable has a POSIX formatted date [number of seconds since 1970]). <li data-bbox="537 999 1365 1041">■ Date at Time (seconds since 1970). Same as the preceding item, but also provides the caller the time. <li data-bbox="537 1062 1365 1136">■ Time (seconds since 1970). If the variable value contains the POSIX equivalent of 10:35 A.M., the caller hears: <i>Ten thirty-five, A.M.</i> (This example assumes the variable contains a POSIX time value.) <li data-bbox="537 1157 1365 1230">■ Time (format HHmm). If the variable value is 1035, the caller hears: <i>Ten thirty-five, A.M.</i> (This example assumes the variable is in the 24-hour format [hhmm].) <li data-bbox="537 1251 1365 1346">■ Prompt. Assumes the variable contains the ID of a prompt. The rules and requirements for variables in campaigns are the same as they are for variables in project menus. For more information on variables, see "Using Variables in Menus" on page 11-2.
Play Prompt	<ul style="list-style-type: none"> <li data-bbox="537 1367 1365 1461">■ Prompt Name. From the list, select the prompt to play. You can select only company (custom) prompts that already exist. You cannot select a system prompt. <li data-bbox="537 1482 1365 1535">■ Record File Name. Select and then type the filename to store a recording of the customer's call. <li data-bbox="537 1556 1365 1650">■ Variable Reference. Select and then type a variable containing the ID of a custom prompt. The rules and requirements for variables in campaigns are the same as they are for variables in project menus. For more information on variables, see "Using Variables in Menus" on page 11-2. <li data-bbox="537 1671 1365 1713">■ Allow Caller to Interrupt. If you select this option, the customer can enter a key press while the prompt is playing and stop the prompt. You cannot interrupt the Play Prompt action with another action (for example, a Database Query action).

Option	Description
Get User Digit	<ul style="list-style-type: none"> <li data-bbox="618 228 1446 373"> <p>■ Number of Digits. Type the number of digits the caller must enter.</p> <p>Note: This number includes any terminating key that you might ask the customer to enter. For example, if you use the following option (Enter your account number. Then, press the number sign (#) key you must include the number sign (#) terminating key in your count.</p> <li data-bbox="618 390 1446 443"> <p>■ Store User Input in Variable. Type the variable name that the campaign uses to store the digits that the caller enters.</p> <li data-bbox="618 459 1446 533"> <p>■ 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.)</p> <li data-bbox="618 550 1446 602"> <p>■ Do not Display in Interaction History. Check so that the caller's entry will not appear in the Interaction History record.</p> <li data-bbox="618 619 1446 722"> <p>■ Terminator. Select this option to allow the caller to enter a terminating key. Then, select the key from the list. (A terminating key is a way that the caller can notify Oracle Contact On Demand: I have finished entering the information you required.)</p> <p>For example, you might ask the caller to enter the account number and then press the number sign (#) key as a terminating key. A terminating key is useful if the caller's information can be different lengths, as when some account numbers are longer than others.</p> <li data-bbox="618 852 1446 926"> <p>■ Number of Retries Before Disconnect/Time-Out. Type the number of times the campaign will replay the menu prompt before disconnecting the call.</p> <li data-bbox="618 942 1446 995"> <p>■ Wait Time Before Replaying Menu. Type how many seconds the campaign waits before replaying the menu prompt.</p>

Option	Description
Database Query	<p>Select this option to run an SQL query and capture the result in a table. For more information on how to write SQL queries, see "Running SQL Queries" on page 14-16.</p> <p>You cannot implement another action (for example, the Play Prompt action) at the same time as the Database Query action.</p> <p>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 list. Your query runs against the database you select. For more information on SQL Queries, see "Running SQL Queries" on page 14-16</p> <ul style="list-style-type: none"> ■ SQL Query. Type the SQL Query that you want the campaign to run. Note: When creating a campaign, do not use a semicolon to end the query. ■ 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 list, select a Database Connection. The campaign runs your query against this database.
Set Variables	<p>Use this option to:</p> <ul style="list-style-type: none"> ■ Create and initialize new variables. ■ Set the value of an existing variable. <p>Enter the following:</p> <ul style="list-style-type: none"> ■ Variable. Type the variable name in the box. ■ Value. Type the value in the box. <p>You can also use string, numeric, and comparison operators, as in the following example:</p> <pre>\$tmp = 'hello' \$tmp = \$tmp1 > \$tmp2 \$tmp = 1 + \$tmp2</pre> <p>For information on the available explicit variables and intrinsic variables and functions, see "About System Variables" on page 14-11.</p>

Option	Description
Set Variables to Object	<p>Select this option to assign the ID of a workgroup, user, or prompt to a variable. For more information on variables, see "Variables in Campaigns and Reference Fields" on page 14-11.</p> <ul style="list-style-type: none"> ■ Select Object Type. From the list, select an object type. ■ Variable. Type the name of a new or existing variable. ■ Value. From the list, select a specific workgroup, user, or company (custom) prompt.
Set Language	<p>Language. From the list, select a language. From this point forward, the campaign plays all prompts in this language.</p> <p>Note: Make sure all of your prompts are 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.</p>
Record	<ul style="list-style-type: none"> ■ File Name. The name of the variable that will receive the actual file name that the record action generates. ■ Validate. Select this option to verify that the file exists. ■ Terminator. From the list, select the terminating key to use to stop recording. ■ Maximum recording time. Type how long (in seconds) to record the caller before the campaign stops recording.
Music Broadcast	<p>Select this option to play streaming audio (music broadcast) to a caller. For more information on music broadcasts, see "Setting Up a Music Broadcast" on page 7-4.</p> <p>Note: You must first create a music broadcast source.</p> <ul style="list-style-type: none"> ■ Select Music Broadcast. From the 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. <p>You must do one of the following:</p> <ul style="list-style-type: none"> ■ Enable the Play For option. ■ Enable the Allow Caller to Interrupt option. ■ Precede the Play Music action with an Enter Workgroup action. <p>If you do not, the caller is left listening to the music broadcast indefinitely.</p>

Option	Description
Send Emails	<p>Select this option to send an email to any valid address or email group.</p> <p>Note: Before using this action, you must create at least one SMTP Group. For more information on creating SMTP groups, see "Adding or Editing an SMTP Groups Library" on page 6-49.</p> <ul style="list-style-type: none"> ■ SMTP Group. From the list, select an existing group. ■ From. Type an email address (128 characters maximum) or a variable name that contains the email address value. ■ To. Type an email address (128 characters maximum) or a variable name that contains the email address value. ■ Subject. Type a title for the email (128 characters maximum) or a variable name that contains the subject value. ■ Message. Type your email message (2048 characters maximum). The message can contain variable values to be substituted. ■ Attachment. Choose from the following: <ul style="list-style-type: none"> None. This is the default setting. The email does not have an attachment. Select Fax Library. Select and then, from the list, select an existing fax from the Fax library. ■ FAX Variable Reference. Select and then type the name of the variable already assigned to the attachment. ■ Recording Filename. The variable containing the recording filename, as received from the Record action.
Enter Workgroup	<p>Select this option to route a call to a workgroup and to keep the opportunity 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.)</p> <p>Note: If you use the Menu Type window to route to a workgroup extension, fax, or voice mail, the campaign immediately routes the call to the workgroup, and never returns the call to your campaign.</p> <p>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 option to return the call to your campaign.</p> <p>Note: After an agent accepts the call, the call permanently exits the campaign, and you can never bring it back.</p> <p>Select from the following:</p> <ul style="list-style-type: none"> ■ Select Workgroup. From the 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. For more information on variables, see "Using Variables in Menus" on page 11-2. <p>Note: If your variable has an invalid workgroup name, the campaign routes the call to your default-system error choice. For more information, see "Using Set Variables to Object Action with Another Action" on page 14-15.</p>

Option	Description
Get DTMF	<p>Use this option to do the following:</p> <ul style="list-style-type: none"> ■ Prompt the user to make a choice by pressing a key (such as <i>Press 1 to continue in English...</i>) ■ Capture the user's key presses. ■ Route to a special child node for handling the user's key presses. <p>Note: A Play Prompt always precedes the Get DTMF action. This action uses special DTMF child nodes (which handle the key press) and are created using the Menu Routing Conditions window.</p> <p>Select from the following:</p> <ul style="list-style-type: none"> ■ 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. <p>Note: These two simple options use complex execution logic.</p> <p>For a simple example of how to use the Get DTMF action and the DTMF child nodes, see "Linking Resources in Campaign Manager" on page 13-4. For more information about the DTMF child nodes, see "Routing a DTMF" on page 13-16.</p>
Enable Quality Control Recording	<p>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.</p> <p>Note: Supervisors can listen to the recording from the Supervision Manager Interaction History tab.</p>
Disable Quality Control Recording	<p>Select this option to ensure that Oracle Contact On Demand does not record calls in your campaign. However, you can override this action in Administration Manager.</p>
Play Estimated Wait Time	<p>Select this option to inform the waiting customer (phone or Web chat) of the estimated wait time. The assessments for the Estimated Wait Time is done at the beginning of the interaction. It is not updated after this time. This option should only be used at the beginning of the campaign.</p>
Exit Workgroup	<p>Note: Always use this option with the Enter Workgroup option.</p> <p>Select this option to request an available agent from a workgroup while your campaign controls the call.</p> <p>A caller cannot enter a new workgroup until the caller exits the current workgroup. Therefore, you must use the Exit Workgroup option before routing a caller to a new workgroup.</p> <p>After an agent accepts the call, the call permanently leaves your campaign. 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:</p> <ul style="list-style-type: none"> ■ Ask the caller to press 1 to speak to an agent. ■ Capture the caller's key presses. ■ Route to a child DTMF node (if the caller presses 1). ■ Use Enter Workgroup to request an available agent. ■ Check estimated wait time. <p>Note: If the caller has been waiting too long, use Exit Workgroup to route the caller to another option in your campaign.</p>
Set Script URL	<p>From the list, select a script to display to the agent when the campaign routes the call to the agent.</p>

Option	Description
Set FAQ URL	From the list, select an FAQ to display to the agent when the campaign routes the call to the agent.
Workgroup Callback	<p>Select this option to:</p> <ul style="list-style-type: none"> Get the caller's country code and phone number. Send a callback request to a Workgroup. <p>This action submits a callback request to a workgroup, and then disconnects the call. For example, in one node you can have these actions:</p> <ul style="list-style-type: none"> Play Prompt (prompt the caller for the country code) Get User Digit (capture the country code in a variable) Play Prompt (prompt the caller for the phone number) Get User Digit (capture 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) <p>Select from the following:</p> <ul style="list-style-type: none"> 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. <p>The campaign uses the workgroup that 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. For more information on campaign settings, see "Using Set Variables to Object Action with Another Action" on page 14-15.</p> <ul style="list-style-type: none"> Select Workgroup. Select this option to send the callback request to the workgroup that you select from the corresponding list. Variable. Select and then type a variable name, which is already populated with the ID of a workgroup. For more information on the rules and requirements for variables in campaigns, see "Using Variables in Menus" on page 11-2 and "Variables in Campaigns and Reference Fields" on page 14-11. <p>Note: If your variable does not contain the name of a valid workgroup, the campaign routes the call to your default system error choice. For more information on campaign settings, see "Using Set Variables to Object Action with Another Action" on page 14-15.</p>
Web Service	<p>Enter the following information to access a Web service:</p> <ul style="list-style-type: none"> URL. The Universal Resource Locator address of the Web service. Timeout (sec). The time after which Oracle Contact On Demand 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.
CRMOD Integration Library	From the list, select a CRMOD Integration Library to display to the agent when the campaign routes the call to the agent. For more information on CRMOD Integration libraries, see "Creating an CRMOD Integration Library" on page 6-57.

Note: You can link actions in a row, so that one node might have multiple actions.

After selecting either the Set Menu Type or Set Action Menu box, the Campaign Wizard presents different options.

8. Select the options that you want.

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.

Removing an Action from a Node

You can remove an action from a node.

To remove an action from a node

1. Right-click a node.
2. Select Remove Action Menu/Menu Type.

About Menu Type Routing

Choose the Menu Type window to route the caller to a feature inside or outside a campaign. For example, you can do the following:

- Route a call to any node in the current campaign.
- Route a call to an external number or to a project.

A node with a menu type is a termination point and does not require any child nodes. Oracle Contact On Demand sends the call to another node or to some other feature. For more information on menus, see "[About Project Menu Types](#)" on page 11-1.

Selecting a Menu Type to Add to a Node

This topic describes how to route the caller to a feature inside or outside a campaign.

To select a menu type to add to a node

1. Right-click a node, and select Set Menu Type.
The Menu Type window opens.
2. Specify the Menu Type options.

Setting 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 set a menu type

1. Choose Set Menu Type from the submenu of a node.
The Menu Type window opens.
2. Select an action.

The following table describes the options.

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 disconnects the call.
Existing Menus	Routes the call to an existing project menu.
External Number	<p>Routes the call to an external number (outside the company). Select a country code, and then enter the complete number. You can manually enter the external number or use a variable to interpret the field.</p> <p>Select from the following to manually enter the external number:</p> <ul style="list-style-type: none"> ■ Country Code. Select the country code from the list. ■ External Number. Enter the 10-digit number or a variable to route the call. <p>Select from the following to set a variable for the external number:</p> <ul style="list-style-type: none"> ■ Variable Entry. Enter a variable name, which is already populated with a country code. <p>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.</p>
Mailbox	<p>Select this option to play the prompt entermailbox.wav, allow contact center agents to access their non-ACD voice mail messages from a remote telephone, and allow agents to set up their voice mail greetings. The entermailbox.wav is: <i>Please enter your mailbox number, followed by the pound key.</i></p> <p>For agents to access the Mailbox Manager remotely:</p> <ul style="list-style-type: none"> ■ 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. <p>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, instruct your agents to press a key to access their voice mail messages, even though the feature is not an option in the recorded prompt.</p>
Previous Campaign	<p>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.</p> <p>Note: If there is no previous campaign, a system error occurs and Oracle Contact On Demand executes your default system error routing decision. For more information on campaigns, see "Using Set Variables to Object Action with Another Action" on page 14-15.</p>
Project	Routes the call to an existing project.

Option	Description
User Extension	These six options all work in the same way. You can either select a user or a workgroup name from a list, or enter a variable assigned to the ID of a user or workgroup. For more information on variables, see "Using Set Variables to Object Action with Another Action" on page 14-15.
User Fax	
User Voicemail	
Workgroup Extension	
Workgroup Fax	
Workgroup Voicemail	
Existing Nodes	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 Oracle Contact On Demand executes the default system-error routing decision. For more information about creating a default routing decision, see "Using Set Variables to Object Action with Another Action" on page 14-15.
	Note: You can also route a call to a workgroup from an action.
Existing Nodes	Routes the call to any node in the current campaign.

Removing a Menu Type from a Node

You can remove a menu type from a node.

To remove a menu type

1. Right-click a node.
2. Select Remove Action Menu/Menu Type.

Variables in Campaigns and Reference Fields

In addition to the system variables that are available in Administration Manager, you can create user-defined variables to define the behavior of the call workflow. The rules and requirements for variables in campaigns are the same as those for project menus. For more information on project menus, see ["Using Variables in Menus"](#) on page 11-2.

Caution: Before entering a variable in a Variable 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 resource (workgroup, user, or prompt) and assign it to a variable. When the ID is in the variable, you can enter the variable name in the Variable field.

About System Variables

In addition to creating your own variables, Oracle Contact On Demand provides explicit system variables and intrinsic system variables that you can use. System variables have values that are automatically set. [Table 14-1](#) describes the system variables.

Note: All variables are stored as strings.

Table 14–1 Explicit System Variables

Explicit System Variables	Description
\$ACD_PRIORITY	Initially this variable is set to the priority of the project, which is set in the Priority list box. If you enable Customer Priority Routing, Oracle Contact On Demand can change the value of this variable to the customer priority. For more information on variables, see "About Assigning Priority Levels to Customers" on page 17-1.
\$ANI	The current incoming phone number.
\$CID	If your project prompts the customer for the customer ID, 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 box, the \$CID variable remains empty.
\$CONNECT_ACT_AGENT	0=not trying to connect and 1=try to connect to an ACD agent.
\$DNIS	The phone number the caller dialed.
\$INTDATE	The date and time when the current interaction began. This variable has a POSIX timestamp format (the number of seconds since midnight, January 1, 1970, UTC/GMT.)
\$INTID	The ID of the current interaction.
\$SQLSTATUS	The status of the last query executed from an SQL Query project menu. For more information on SQL Query menus, see "Creating SQL Query Menus" on page 11-17. The possible values are: <ul style="list-style-type: none"> ▪ FAIL ▪ NO-ROWS ▪ PENDING ▪ SUCCESS
\$SSSWGNAME	The name of the current workgroup.

[Table 14–2](#) describes the intrinsic system variables. You can access these variables like other variables in the Interactive Voice Response (IVR), but they are not attached to the interaction.

Table 14–2 Intrinsic System Variables

Intrinsic System Variables	Description
\$COMPANYDATE	Returns the timestamp in company time zone (including Daylight Savings Time (DST) offset).
\$CURRENTDATE	This variable is the same as the \$TODAYSDATE system variable. Stores the current date in the format YYYYMMDD.
\$CURRENTTIME	Stores the current time in the format HHMM.
\$CURRENTTIME2	Returns the current time in the company time zone. It stores the current time in the format hhmmss.
\$DATE	Current POSIX time in seconds (number of seconds since January 1st, 1970).
\$DAYOFWEEK	The day of the week (where 1= Sunday,... 7=Saturday).

Table 14–2 (Cont.) Intrinsic System Variables

Intrinsic System Variables	Description
\$DAYOFYEAR	Julian day. Day of the year for the current day 1 - 365.
\$HOURS	The current number of hours past midnight {0 to 23} in the company time zone.
\$MINUTES	The current number of minutes after the hour {0 to 59} in the company time zone.
\$SECOMNDS	The current number of seconds after the minute {0 to 59}.
\$TODAYSDATE	Stores the current date in the format YYYYMMDD.
\$WEEKOFYEAR	Week of the year for the current day 1 - 52.

Operators and Values

Operators allow you to manipulate variables in a campaign:

Note: All variables are stored as strings.

Table 14–4 describes the operators.

Table 14–3 Operators

Operators and Values	Description
Grouping Operators	
'(' and ')'	Groups values.
Math Operators	
+	Adds values.
-	Subtracts values.
*	Multiplies values.
/	Divides values.
%	Percentage of value.
Logical Operators	
=	Equal to
>	Greater than
<	Less than
!=	Not equal to
>=	Greater than or equal to
<=	Less than or equal to

Table 14–4 describes the values.

Table 14–4 Values

Values	Description
integer	Integer (the default).

Table 14–4 (Cont.) Values

Values	Description
string	Indicated by enclosing within single quotes.
variable value	Indicated by \$<variable name>.
function value	Indicated by !<function name>.

Use comparison operators (also called logical or test operators) to test conditions, such as, is variable A equal to variable B?

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. For example, \$Balance=5 indicates to assign the variable \$Balance the value of 5, and \$Balance==5 indicates to compare the value of \$Balance to 5. (Is the value of \$Balance equal to 5?)

Functions

Functions provide useful utilities in the creation of call workflow variables. All functions begin with an ! character. Some functions (as indicated by an *) use real time ACD Server messages and will block for up to 5 seconds while awaiting a returned result. If there is no response, the result will be empty.

[Table 14–5](#) describes the various functions.

Table 14–5 Functions

Function	Description
!GetWGID(\$SYSWGNAME)	Returns the workgroup ID.
!GetSubString(aString, startPosition, length)	Returns a substring from the string.
!GetStringLength(aString)	Returns the length of the string.
!GetWGLoggedIn(workgroupID) *	Returns the number agents logged in to the workgroup.
!GetAllLoggedIn() *	Returns the number of all agents logged in to the workgroup.
!GetWGAvailable(workgroupID) *	Returns the number of agents available for the workgroup.
!GetWGCallQueued(workgroupID) *	Returns the number of ACD calls currently queued for the workgroup.
!GetCOACDCallQueued() *	Returns the number of ACD calls currently in the queue for the company.
!GetUserID(userName)	Returns the user ID.
!GetWGID(workgroupName)	Returns the workgroup ID.
!GetWGName(workgroupID)	Returns the workgroup name.
!Random()	Returns the percentage and follows standard random rules.

Setting Variables to Route Calls from a Campaign to a Workgroup

The Set Variable action in Administration Manager is used to create and initialize new variables or to set the value of an existing variable. It uses an expression evaluator for the value. Expressions contain operators and values.

In this example, set a variable that you can use to route from a campaign node to a workgroup.

To set a variable to route calls from a campaign to a workgroup

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 list, select `Sales_Workgroup`, and then 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, Oracle Contact On Demand 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 list, select `Sales_Workgroup`.
 - c. Click Variable Reference, and type `$Sales` into the box, and then click OK.

Using Set Variables to Object Action 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.

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. Choose the Variables to Object action to find the internal ID of a workgroup, and then assign it to a variable (`$Sales`).
 - b. Enter the `$Sales` variable in the Variable Reference field of the 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, Oracle Contact On Demand expects the variable to have an internal ID number (not the name of a prompt or a workgroup). For example, in the Oracle Contact On Demand 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, Oracle Contact On Demand expects your variable to have the ID of the prompt (71), not the prompt name (`Play_Welcome.wav`).

Sending an Email Automatically from a Part of the Campaign

Oracle Contact On Demand allows you to define your campaign to automatically send an email along with an attached recording. You can set variables to automatically generate recording file names. The recording is available in the IVR for as long as the interaction is active.

Complete the following steps to set up your campaign to automatically send an email and attached recording.

To send an email automatically from part of the campaign

1. Choose Set Action Menu from the sub-menu of a node.
The Action Menu window opens.
2. Select Play Prompt and Set Variable.
3. Assign value to `$var = !GetWGID(<workgroup name or $variable (representing the workgroup name)>)`
4. Click the Plus icon in the Begin node and select Regular Expressions.
5. Add the following Regular Expressions:
 - a. `$var1! = 0`, route caller to workgroup
 - b. `$var1 == 0`, record and send email
6. Right-click on the `$var1 == 0` node and select Set Menu Type.
7. From the Menu Type window, select the Workgroup Extension.
8. Select a group name from the Workgroup Name list.
9. Right-click on the `$var1 == 0` node, select Set Action Menu, and then click OK.
10. From the Action Menu window, select Record.
11. In the File Name field, enter the variable, for example, `$record`.
12. Select Validate and then choose the number sign (#) as the terminator.
13. Select Send Email.
14. Enter a valid SMTP, From, To, Subject, and Message.
15. Select Recording Filename.
16. Enter the recording file variable name, `$record`.

Running SQL Queries

Before running an SQL query, you must do the following:

- (Windows only) Create an ODBC System DSN entry for the database to access. The DSN entry must be created on the computer where the Oracle Contact On Demand Statistics Server is installed.
- Create a Database Connection that points to your System DSN.

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:

- [Adding or Editing a Project Definition](#)
- [Process of Adding Phone Interactions to a Project](#)
- [About Dialer Lists](#)
- [Uploading a Dialer List](#)
- [Roadmap for Using a Dialer List](#)
- [Adding Chat Interactions to a Project](#)
- [Adding Email Interactions to a Project](#)
- [Adding Web Callback Interactions to a Project](#)
- [Selecting Fax Responses for the Project](#)
- [Adding Interaction Outcomes to a Project](#)
- [Overriding Workgroup Prompts for the Project](#)
- [About Contact Templates](#)

Adding or Editing a Project Definition

You create a project definition by assigning a project name, providing a description, and choosing the default language that the project supports. The same project can handle one or more interaction types.

This task is a step in the ["Roadmap for Setting Up Your Contact Center in Administration Manager"](#) on page 4-1 and in ["Roadmap for Configuring the Integration between Oracle Contact On Demand and Oracle CRM On Demand"](#) on page F-13.

To create a project definition

1. Click Options, then Projects.
2. Do one of the following:
 - To add a new project, click Add.
 - To edit an existing project, select the project you want to edit from the list of projects, and click Edit.

The Projects screen opens to the General tab.

3. Complete the Project Name fields.

The following table describes the 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. This text is informational only and does not affect the functioning of the project.
Select a Default Language for this Project	From the list, select the language for this project. Oracle Contact On Demand plays prompts recorded in this language for callers reaching this project. To change the language in which Oracle Contact On Demand plays prompts, route callers to the touch-tone menus or other projects that have an alternate language.
Outbound ANI/CLI (Phone Number)	This is the number or CID that Oracle Contact On Demand will present for the outbound calls from this project. When an outside party receives an outbound call from this project, this is the number that the called party will receive as the caller ID of the incoming call. There is a selection box for the defined DNIS and an option to disable the outgoing CID.
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 list, select a display template for this project. Every project uses a template to support features like auto-assignment. Select the default system display template or create a different template. For more information on how to create a template, see " About Default Display Templates Library " on page 6-2. 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 Interaction Manager.
CRMOD Integration Library	From the list, select a CRM integration library for this project. The association of a library is necessary to support the integration of Oracle Contact On Demand and CRMOD. The following default CRMOD library options are available when you create a new company: <ul style="list-style-type: none"> ■ Service Request Management ■ Outbound Dial ■ General Inbound ■ Sales Inbound ■ None <p>Oracle Contact On Demand allows you to create a library to handle company-specific activities to extend the CRMOD integration. Extending the integration requires advanced knowledge.</p>

Field	Description
Enable Project Interaction Limit Interaction Limit box	Select this 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, Oracle Contact On Demand plays a busy signal to the caller.
Enable Dial Code	When this option is selected, Oracle Contact On Demand 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 call, 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, Oracle Contact On Demand dials the number, enters the password, and then connects the call. Note: This field accepts only digits (0-9) and a comma (.). Choose the comma to add a pause before or after the password.
Number of Digits to Activate Dial Code	Enter the number of digits that Oracle Contact On Demand requires for a dial code. For example, if you enter 10, Oracle Contact On Demand determines that the dial code for all numbers contains 10 digits or more.
Present Menu	If this option is selected, Oracle Contact On Demand 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 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: <ul style="list-style-type: none"> Oracle Contact On Demand places a customer on hold while waiting in a workgroup queue. 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: <p>Prompt. From the list, select the System Default prompt or a custom Company Prompt.</p> <p>Music Broadcast. Select this option so that the customer hears streaming music while on hold.</p>
Enable Automatic Recording of Calls Percentage LOV	Select this option to record calls automatically. In the Percentage of Recording LOV, select how many calls to record.

4. 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, complete the following tasks:

- ["Setting Up a Project to Handle Phone Interactions"](#) on page 15-4
- ["Routing Phone Interactions Based on the Caller's Number"](#) on page 15-7
- ["Setting Up Shared-Number Phone Projects for Scheduling"](#) on page 15-7

Setting Up a Project to Handle Phone Interactions

Set the telephone number that customers use to reach the project.

This task is a step in ["Process of Adding Phone Interactions to a Project"](#) on page 15-3.

To set up a project to handle phone interactions

1. Click the Phone tab.
2. Select the Enable Phone Project option.
3. Complete the fields in the top half of the screen.

The following table describes the fields.

Field	Description
Project Phone Number	<p>From the list, select a telephone number for customers to dial to reach this project.</p> <p>If permissions have been set for your account, when you click the Project Phone Number list, a list of all phone numbers defined for use in Oracle Contact On Demand projects by the network administrator will be displayed.</p> <p>Numbers already in use by other projects do not appear in the list and cannot be selected for use by this project. For more information on how to define Project Phone Numbers for a Company, see "Adding or Editing a DNIS Library" on page 6-36.</p>
Priority	<p>From the list, select the priority level to assign to interactions reaching this phone project. (Oracle Contact On Demand assigns this priority to the interaction only if Customer Priority is not enabled.)</p> <p>Oracle Contact On Demand routes high-priority project interactions to an agent before routing low-priority project interactions for the same workgroup</p>
Validate phone number	<p>Click No. Oracle Contact On Demand does not prompt the caller for a phone number.</p>
No	<p>Choose the validated telephone number to identify the customer for prioritization. For more information on how to use telephone number information to prioritize customers, see "Setting Customer Priority" on page 17-1.</p>
Yes	<p>Click Yes or Only if received, so that Oracle Contact On Demand plays the file (defined for the entertelno prompt), which asks the caller to enter a telephone number.</p>
Only if received	<p>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 Oracle Contact On Demand Network Manager), then Oracle Contact On Demand interprets the phone number as: <i>Not Received</i>. Oracle Contact On Demand drops the call if it is unable to validate the phone number after three attempts by the customer to supply the number.</p> <p>Note: For this feature to work correctly, you must select Enable Customer Priority Rating.</p>
Play Confirmation	<p>If Validate Phone Number is checked, then select Play Confirmation so that Oracle Contact On Demand plays the customer's phone number for the customer.</p>

Field	Description
Use Prompt to ask for customer ID	<p>Select this box to enable customer prioritization.</p> <p>Oracle Contact On Demand plays the specified prompt from the Company Prompt library and requires the customer to enter an ID number. (Choose the digits supplied by the caller to identify the customer for prioritization. For more information on how to use Customer ID information to prioritize customers, see "Setting Customer Priority" on page 17-1.</p> <p>Note: Enable Customer Priority Routing (from the Phone Project Options) for this prompt to work.</p>
Script	<p>From the list, select the script to display to the agents receiving the phone interactions that come into this project.</p> <p>Note: If you route the caller to a Menu, Oracle Contact On Demand displays the script specified in the Menu definition.</p> <p>If you specify None for the script in the menu definition, Oracle Contact On Demand does not display a script to the agent (even if a script for the project is specified).</p>
FAQ	<p>From the list, select a list to display to agents receiving phone interactions coming into this project.</p> <p>If you route the caller to a menu, Oracle Contact On Demand displays the FAQ specified in the Menu definition.</p> <p>If you specify None for the FAQ in the menu definition, Oracle Contact On Demand does not display an FAQ to the agent, even if an FAQ is specified for the project.</p>

4. Click the Route caller sub-tab if it is not already selected.

5. Complete the fields.

The following table describes the fields.

Field	Description
Workgroup	<ul style="list-style-type: none"> ■ Click Workgroup, select a workgroup from the list (so that Oracle Contact On Demand routes callers to that workgroup), and then click one of the following: <ul style="list-style-type: none"> ■ Route to Workgroup Agent. Oracle Contact On Demand routes the call to the best available agent working in the workgroup. ■ Route to Workgroup Fax. Oracle Contact On Demand routes the incoming fax interactions to the best available agent in the workgroup.
Agent	<p>Click Agent, select an agent from the list (so that Oracle Contact On Demand routes callers to that agent), and then click one of the following:</p> <ul style="list-style-type: none"> ■ Route to Agent Phone. Oracle Contact On Demand routes the call to the agent's telephone. ■ Route to Agent Fax. Oracle Contact On Demand routes the incoming fax interactions to the agent's workstation.
Menu	<p>Click Menu, and then select a menu from the list (so that Oracle Contact On Demand routes the caller to that touch-tone menu). For more information on how to create touch-tone menus that callers can use to navigate to the contact center, see Chapter 11, "Creating Project Menus."</p>
Campaign	<p>Select this option to route calls to a campaign. For more information about campaigns, see Chapter 12, "Overview of Campaign Management."</p>

6. Click the Prefix Routing sub-tab if prefix routing groups exist for the project.

Prefix Routing Groups will not appear in a phone project if there is only one phone project for the company. For more information on routing groups, see ["Adding or Editing a Prefix Routing Group Library"](#) on page 6-46.

7. Set up the call routing.

For more information on call routing, see ["Routing Phone Interactions Based on the Caller's Number"](#) on page 15-7.

8. Click the Options sub-tab.
9. Complete the fields in the Options sub-tab, and then click OK.

The following table describes the fields.

Field	Description
Menu played before voicemail	From the list, select the menu to trigger before the caller leaves a voice mail for an agent. (This feature gives the caller a chance to reenter the contact center before leaving a voice mail message.)
Menu played after voicemail	From the list, select the menu to trigger after the caller leaves a voice mail for an agent. (This feature allows the caller to reenter the contact center after leaving a voice mail message.) Note: If you do not specify a menu, after the caller leaves a voice mail message, Oracle Contact On Demand will disconnect the caller. Oracle Contact On Demand plays the menu only for callers who reach an agent's voice mail, for the following reasons: <ul style="list-style-type: none"> ■ The agent did not answer. ■ The agent intentionally sent the caller to voice mail after accepting the interaction. (Callers who decide to leave a voice mail instead of waiting in a workgroup queue do not hear the menu.) The list does not show any selections unless you already created them. For more information on menus, see Chapter 11, "Creating Project Menus."
Enable Follow Me	Select this option to play the anotherlocation.wav prompt, which enables the caller to try to reach an agent at the forwarding numbers. Note: If the Follow Me numbers for the agent do not exist, Oracle Contact On Demand routes the caller directly to the agent's voice mail.
Enable Customer Priority Rating	Select this option so that Oracle Contact On Demand uses Customer Priorities in this project. For more information on creating customer priorities, see "About Assigning Priority Levels to Customers" on page 17-1. The customer priority can change how long the customer spends waiting to reach an agent. Oracle Contact On Demand 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, Oracle Contact On Demand gives the customer the lowest priority by default.
Whisper Prompt to Agent	From the list, select the prompt only the agent hears when accepting an incoming call. For more information on how to create whisper prompts, see "Customizing System Prompts" on page 7-5.
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, Oracle Contact On Demand routes calls based on the caller's phone number. For more information on routing, see ["Adding or Editing a Prefix Routing Group Library"](#) on page 6-46, and ["Adding or Editing an Inbound Email Server Library"](#) on page 6-40.

This task is a step in ["Process of Adding Phone Interactions to a Project"](#) on page 15-3.

To route phone interactions based on the caller's number

1. Create projects to handle routed calls.

For more information on routing, see ["Adding or Editing a Project Definition"](#) on page 15-1 and ["Process of Adding Phone Interactions to a Project"](#) on page 15-3.

2. Click Options, Projects, the Phone tab, and then the Prefix Routing sub-tab.
3. Select the Enable Phone Project option.

Additional selections appear.

4. In the Name column, select a prefix routing group.
5. In the Projects list, select a project.

Depending on which option you select, one of the following occurs:

- When Oracle Contact On Demand receives a call matching the Prefix Routing Group, Oracle Contact On Demand routes the call to the project identified in the list.
 - If your project uses more than one Prefix Routing Group, Oracle Contact On Demand 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*. Oracle Contact On Demand always executes the first Routing Group.
6. Click the Route caller to tab, complete the Route caller to tab to select a routing action for calls that do not match your Prefix Routing Groups, and then click OK.

For more information on completing the Route Caller to tab, see Step 3 in ["Setting Up a Project to Handle Phone Interactions"](#) on page 15-4.

Setting Up Shared-Number Phone Projects for Scheduling

Although 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. For more information on scheduling, see [Chapter 16, "Setting Up Project Schedules."](#)

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 (Enterprise Edition users) for the additional scheduled projects that share the same number.

This task is a step in ["Process of Adding Phone Interactions to a Project"](#) on page 15-3.

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 that customers dial to reach the project.

For more information on projects, see ["Setting Up a Project to Handle Phone Interactions"](#) on page 15-4.

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, depending on which edition of Oracle Contact On Demand you use:

- If you have permission, select None for the phone number.
- For the Enterprise Edition, 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 Steps 1 and 2.

For more information on project schedules, see ["Setting Up Project Schedules"](#) on page 16-1.

4. When defining the schedules, specify a phone number to replace the empty phone number (dummy) while the scheduled project is active.

About Dialer Lists

A dialer list is a CSV (comma separated value) file that contains the names and phone numbers of customers to call in a project. Only a few restrictions apply to 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.

Oracle Contact On Demand copies only the fields that you map from the dialer list .csv file into the Oracle Contact On Demand database. You can map as many or as few fields as you want. However, you must map at least one phone field. Agents can only see mapped contact information. If you do not map a phone field, agents will not be able to see the information when they connect to a call.

The first row of the .csv file must contain the field names, separated by commas. The names of the columns and the data in those columns along with the contact template fields that you map to them are very important.

For example, the first row of the .csv file might contain the following values:

- Last Name,
- First Name,
- Home Country Code,
- Home,
- Work Country Code,
- Work,
- Company,

Each phone number field in the Mapping window consists of:

- The country code (dialing prefix, such as 1), if a comma delimiter exists in the dialer list.
- The area code (such as 888) and the phone number (such as 5551212).

Adding a Dialer List to a Project

The following procedure describes how to add a dialer list to a project. For more information on dialer lists and .csv files, see "[About Dialer Lists](#)" on page 15-8.

To add a dialer list to a project

1. Enter the location on the hard drive or mapped shared drive where the dialer list file resides.
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.

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, and the first row must contain field names
- A company and a project

Complete the following procedure to upload a dialer list.

To upload a dialer list

1. Click Options, Projects, and then the Dialer Lists tab.
2. Click the Plus icon.

The Add Dialer List window appears:

3. Do the following:
 - Type a name for the dialer list.
 - From Import New List, click Browse, and find the .csv file.

Note: The only supported file format for the uploading of dialer lists is the .csv format. If you attempt to upload a .txt file format, you will receive an error, as it is not supported.

4. Click Next.

The Map Fields to This Contact Template screen appears.

5. Associate the labels in the first row of the .csv file with the fields in the Oracle Contact On Demand database.

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

Notice 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.
6. Click the list box next to First Name.

All the columns in the dialer list appear.

7. Click Apply, and then click Upload.

The list appears in the Dialer List tab.

8. Click the Select Field list boxes at the top of the Dialer List tab.

The Dialer List upload is complete.

Roadmap for Using a Dialer List

You must perform the following tasks before using a dialer list:

- ["Creating a Matching Pattern"](#) on page 15-10
- ["Creating a Pattern-Matching Group"](#) on page 15-10
- ["Modifying the System Contact Template"](#) on page 15-10
- ["Uploading a Dialer List"](#) on page 15-11

Creating a Matching Pattern

You can create a pattern that matches the data in the dialer list to a map you create.

This task is a step in ["Roadmap for Using a Dialer List"](#) on page 15-10.

To create a matching pattern

1. Click Libraries, Matching Patterns, and then Add.
The Add Matching Patterns screen appears.
2. Under Name, enter a name for the pattern.
For example, enter: Pattern for pacific time zone.
3. Under Pattern, type pacific, and then click OK.

Creating a Pattern-Matching Group

You can create a pattern-matching group, and identify all of the patterns that belong to the group.

This task is a step in ["Roadmap for Using a Dialer List"](#) on page 15-10.

To create a pattern matching group

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.

Modifying the System Contact Template

To simplify the task, the project uses the system contact template. In an operating contact center, create a custom contact template for the project.

This task is a step in ["Roadmap for Using a Dialer List"](#) on page 15-10.

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 window appears.

5. Do the following:
 - In the right column, type Time Zone as the field name.
 - From the Associate Label with Action list, select Pattern Matching.
 - From the field Name list, select one of the contacts.field0X fields not previously used.

These are extra fields that Oracle Contact On Demand includes in the Contacts table for customer use.

- Click OK to close the window.
6. Click OK to save your changes to the template.

Uploading a Dialer List

For example, use a simple dialer list with the following columns: First Name, Last Name, Phone, and Country Code.

This task is a step in "[Roadmap for Using a Dialer List](#)" on page 15-10.

To upload a dialer list

1. Click Options, Projects, and then Add.
The Add Project screen appears.
2. Click the Dialer Lists tab, and do the following:
 - From the Select Phone field list, select Work.
 - From the Select Last Name field list, select Last Name.
 - From the Select First Name field list, select First Name.
3. Click Plus, and complete the following steps:
 - Type a name for the dialer list.
 - Click Browse to find your dialer list, and then click Next.

The Mapping screen appears.

- Choose the Map Fields to This Display Template screen to associate the columns in the dialer list with fields in the contact template.

This association is the only way that Administration Manager can determine the data in the dialer list. This example dialer list has only four fields, so you map only those fields.
4. Click Next, and then click Upload.
 5. After the dialer list finishes uploading, click Close window.

The Start/Stop Schedule is complete.

Adding Chat Interactions to a Project

You can set up chat projects to handle Web-based chat requests so that you can control:

- How to route the chat request
- The Web pages to display to the customer while Oracle Contact On Demand handles the chat request
- The Web page content to provide to agents for sending to customers

To set up a chat project

1. Click Options, Projects, the project that you want 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 sub-tab.
3. Complete the fields.
The following table describes the fields.

Field	Description
Priority	From the list, select the priority level to assign to interactions reaching this chat project. Note: Project priority determines the routing order. Oracle Contact On Demand routes interactions through projects with a high priority before routing interactions through a project with a low priority.
Route Chat to Workgroup	From the 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 lists, select the script and FAQ URLs to display on the agent's screen upon receiving the chat interaction.
First Push Page	From the list, select the Web page to display to the customer after the customer submits the chat request and while Oracle Contact On Demand 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 field, enter the length of time (in seconds) to display the first page before beginning the custom push page sequence.
Connected	From the list, select the Web page to display to the customer after successfully connecting to an agent.
Disconnected	From the list, select the Web page to display to the customer when the agent disconnects from the customer or the customer session disconnects for any reason. The customer will see 'Offline' in red followed by the optional disconnected page configured.
If No Agent Available	From the 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 list, select the Web page to display to the customer if the contact center is closed.

4. Under Define Chat Push Page Sequence:

- From the Page Names 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 (that is, after the First Push Page, but before the Connected page appears). For more information on creating push pages for a chat project, see ["Adding or Editing a URL Library"](#) on page 6-51.
 - In the Duration field, type how long to display the page (in seconds).
 - Click Plus to add the selected push page to the sequence.
 - Repeat Steps 1 through 4 of this procedure for all the push pages to show the customer waiting for a connection to an agent.
 - To remove a push page from the sequence, click the page, and click Delete.
5. Click the Chat Response subtab.
- Select the box next to the intelligent chat template to assign it to this project.
For more information on intelligent chat templates, see ["Adding or Editing an Intelligent Chat Template Library"](#) on page 6-21.
 - To assign all templates to the project, click All.
 - To remove all templates from the project, click Clear.
6. Click the Collaboration subtab.

If an agent has an active chat interaction, the collaboration feature allows the agent to view and change the same Web page appearing to the customer.

7. Do the following:
- Select the Enable Collaboration box to enable the Collaboration button in the Interaction Manager Chat tab.
In this way, if the agent has an active chat interaction, and clicks the Collaboration button, a non-modal browser displays on the agent's computer, and loads the same Web page appearing to the customer. Note the following:
 - The collaboration feature 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 the 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 cursor, the customer does not see the cursor move.
 - Select the Enable Collaboration Across Domain option:
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 Interaction Manager, the agent can view the page, but cannot make any changes to the page. To avoid this security feature, select this option, and re-save 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 in 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.

8. From the Enable Parameter Extensions list, select a list that supports the advanced integration of the Chat functionality.

For more information on integrating third-party applications for managing media types, see ["Adding or Editing a Parameter Extensions Library"](#) on page 6-45. For more information on configuring the CRMOD integration for service requests, see ["Creating an CRMOD Integration Library"](#) on page 6-57.

9. Make sure you identified the Workgroup where Oracle Contact On Demand will route chat interactions, and then click the Create Page button.

A Chat Request Page opens.

10. Click the double-arrows.

The Extended Parameters List opens showing the parameter display names from the Parameter Extension library. For more information on libraries, see ["Adding or Editing a Parameter Extensions Library"](#) on page 6-45.

11. Enter data for each extended parameter, up to the size configured.

These parameters are available to Interaction Manager and passed to the Script, FAQ, and Custom tabs.

While requesting a chat, a set of questions is presented to the caller so that Oracle Contact On Demand can route the caller to the best suited agent. In addition, Oracle Contact On Demand might pass as many as five KB article information to the agent in the form of KB article ID and description pair. Oracle Contact On Demand presents this information to the agent for better handling of the interaction.

12. Click OK.

Note: You can edit your Web pages to enable or disable the collaboration feature for individual page elements. For example, remove the collaboration feature on a specific field to prevent an agent from viewing a password entered by a customer. For more information on collaboration, see ["Process of Using Collaboration and Push Pages"](#) on page 15-14.

Process of Using Collaboration and Push Pages

The collaboration feature 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 the collaboration feature) watch or help as the customer navigates a Web site, fills out forms, and so on.

Collaboration essentially means that Oracle Contact On Demand updates the changes to the agent's Web page in the customer's Web page, and updates the changes to the customer's Web page in the agent's Web page.

To use collaboration and push pages, perform the following tasks:

1. ["Setting Internet and Intranet Security"](#) on page 15-15
2. ["Enabling the Collaboration Feature"](#) on page 15-15
3. ["Generating a Chat Request Form"](#) on page 15-15
4. ["Adding Email Interactions to a Project"](#) on page 15-16

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 and the Internet as follows:

- The IE default setting for the local intranet is medium-low.
- The IE default setting for the Internet is medium.

This task is a step in ["Process of Using Collaboration and Push Pages"](#) on page 15-14.

Enabling the Collaboration Feature

In addition to enabling the collaboration feature in Administration Manager, 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.

This task is a step in ["Process of Using Collaboration and Push Pages"](#) on page 15-14.

To enable the collaboration feature

1. Make sure all elements have a unique, numeric ID.

Any element (text box, radio button, and so forth) that you want to update during collaboration must have a unique, numeric ID.

2. Disable the collaboration feature on a specific element by typing a negative number anywhere in the ID string.

If you type a negative sign without a negative number, the collaboration feature is still enabled.

For example, if you disable a text box element, the customer can enter data in that field, but the data does not appear on the agent's screen. Also, the agent can enter data in that field, but the data does not appear on the customer's screen. Disabling the collaboration feature on an element is useful if the element contains sensitive information, such as a password or social security number.

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 Administration Manager to generate the code that produces the Chat Request Form.

Note: When creating a Chat Request Form, the URL to access the Administration Manager login page must include a fully qualified host name (such as `http://myserver.mydomain.com/`). If you accessed Administration Manager through a URL alias or through an abbreviated host name (such as `//myserver/`), your customers cannot access your form.

This task is a step in "[Process of Using Collaboration and Push Pages](#)" on page 15-14.

To generate a chat request form

1. Open the chat project that you created.
For more information about chat projects, see "[Adding Chat Interactions to a Project](#)" on page 15-12.
2. Click Create Page.
Administration Manager 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. Submitting a chat request from your desktop can collide with existing sessions and could be rejected by the Web server.

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. 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.

This task is a step in the "[Roadmap for Setting Up Your Contact Center in Administration Manager](#)" on page 4-1 and in "[Process of Using Collaboration and Push Pages](#)" on page 15-14.

To add email interactions to a project

1. Click Options, Projects, the project that you want to set up, and then click Edit.
The Edit Project screen appears.
2. Click the Email tab, and then select the Enable Email Project option.
3. In the Email Servers sub-tab screen, complete the fields.
The following table describes 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 Oracle Contact On Demand from accessing the email project account to route customer emails to agents.
Route Email to Workgroup	From the list, select the workgroup where Oracle Contact On Demand routes the emails.
Priority	From the list, select the priority level to assign to the interactions reaching this email project. Note: Oracle Contact On Demand 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 list, select the script and FAQ URLs to display on the agent's screen upon receiving the email interaction.
Select POP3	Select the servers to handle the incoming email. Do one of the following:
All	<ul style="list-style-type: none"> ■ Click All to select all the inbound email servers.
Clear	<ul style="list-style-type: none"> ■ Click Clear to clear all the options.
POP3 Icon	<ul style="list-style-type: none"> ■ Click the inbound email server icon to create a new server and add it to the Inbound Email Server library. <p>For more information on how to create inbound email servers, see "Adding or Editing an Inbound Email Server Library" on page 6-40.</p> <p>Oracle Contact On Demand uses the servers according to a round-robin method. If one server is busy, Oracle Contact On Demand uses the next selected server, and so on.</p>
Select SMTP Group	From the list, select the SMTP Server Group to handle the outgoing email for this project. Oracle Contact On Demand uses the servers in the selected group according to a round-robin method. If one server is busy, Oracle Contact On Demand uses the next server, and so on. For more information on how to create an SMTP Server group, see "Adding or Editing an Intelligent Chat Template Library" on page 6-21.

4. Click the Options sub-tab, and complete the fields.

The following table describes the fields.

Field	Description
Select Automated Email Response	From the list, select a number for the Automated Email Response to send to the customer. Oracle Contact On Demand sends the response to the customer only after downloading the email message from the inbound email server. Messages received by the inbound email server, but not yet downloaded to Oracle Contact On Demand, do not receive an acknowledgment of the 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.

Field	Description
Allow Agent to Respond Directly to the Customer	<p>Select this option to allow Oracle Contact On Demand 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.</p> <p>Note: Selecting this option prevents Oracle Contact On Demand from setting alarms for late, agent response times. It also eliminates recording, tracking of client history, and reporting functionality (after the first reply to the customer) for this project.</p>
Show customer email address to Agent	<p>Select this option to allow agents receiving email interactions to:</p> <ul style="list-style-type: none"> ■ View the email address of the customer in Interaction Manager. ■ Allow Oracle Contact On Demand to automatically record the email interaction in the history for the email customer's contact record (if one exists). <p>Clear this option so that Oracle Contact On Demand does not show the agents the customer's email address in Interaction Manager (Oracle Contact On Demand shows only ACD Email.)</p> <p>Note: If you select Allow Agent to Respond Directly to the Customer, then Oracle Contact On Demand automatically selects this option by default.</p>
Reply/From Email address	<p>Select this option to specify a reply email address:</p> <ul style="list-style-type: none"> ■ Use project address for Email reply/From address. ■ Provide Email reply/From address for this project.
Reply/To Email address	<p>Select this option to specify a reply email address:</p> <ul style="list-style-type: none"> ■ Use project address for Email reply/To address. ■ Provide Email reply/To address for this project.

5. Click the Select Intelligent Email Templates sub-tab. Use this tab to associate intelligent email templates with an email project.

For more information on libraries, see ["Adding or Editing an Intelligent Email Template Library"](#) on page 6-22.

6. Check Intelligent Email routing.
7. Complete the fields, and then click OK.

The following table describes some of the fields.

Field	Description
Route Template response to customer if accuracy is greater than or equal to ___%	<p>Select this option to automatically send the Automated Email Response associated with the highest-scoring intelligent email template. This template must have a score higher than the value that you specify in the percentage box. For more information on how Oracle Contact On Demand calculates the scores for each intelligent email template, see "Adding or Editing an Intelligent Email Template Library" on page 6-22.</p> <p>If no templates have an accuracy level higher than the specified value, Oracle Contact On Demand routes the email to an agent in the specified workgroup. With this email is a list of suggested responses from all of the project's intelligent email templates that have scores.</p> <p>If no templates have an accuracy level higher than 0, Oracle Contact On Demand routes the email to an agent in the workgroup that is specified in the Route Email to Workgroup field.</p>

Field	Description
Route Email to agents with suggested responses	Select this option to always route the email to an agent in the specified workgroup with a scored, editable list of suggested responses from all the project's intelligent email templates.
Select Intelligent Email Templates	Select this option to assign an email to the project, and do one of the following: <ul style="list-style-type: none"> Click All to select all the templates. Click Clear to clear all the options. Click the Email icon to create a new template to add to the library. For more information on how to create a new email template, see "Adding or Editing an Intelligent Email Template Library" on page 6-22.

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 callback 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

- Click Options, Projects, the project that you want to set up, and then click Edit. The Edit Project screen appears.
- Click the Web Callback tab, and then select Enable Web Callback Project option. The Web Callback screen appears.
- Complete the fields, and then click OK. The following table describes the Web Callback fields.

Field	Description
Priority	From the list, select the priority level to assign to the interactions reaching this Web callback project. Oracle Contact On Demand 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 list, select the workgroup containing the agents who 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 this option is not selected, the agent will not have the option of rescheduling the callback. If this option is selected, you must re-create and redeploy the Web callback page.
Script	From the list, select the script that you want to display to agents receiving Web callback requests for this project.

Field	Description
FAQ	From the list, select the FAQ content to display to agents receiving Web callback requests for this project.
Contact Center is open	From the list, select the Web page that you want to display after Oracle Contact On Demand successfully delivers the Web callback request to an agent. For more information on how to set business hours for your company, see "Setting Company Business Hours" on page 5-15.
Contact Center is closed	From the list, select the Web page to display during non-business hours or if no agents are logged in to Oracle Contact On Demand. For more information on how to set business hours for your company, see "Setting Company Business Hours" on page 5-15.
Phone Number is Blocked	<p>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.</p> <p>You can add a customer's phone number to the blocked list using Administration Manager, but you can also add numbers to the blocked list using Interaction Manager and Supervision Manager. For more information on call-blocking, see "Adding or Editing a Call-Blocking List" on page 19-1.</p>

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 Administration Manager to generate the code that produces the Web callback request form.

Note: When creating a Web Callback Request Form, the URL to access the Administration Manager login page must include a fully qualified host name (such as `http://myserver.mydomain.com/`). If you accessed Administration Manager 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 that you created.
For more information on Web callback, see ["Generating a Web Callback Request Form"](#) on page 15-20.
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. For more information on creating fax responses, see "[Adding or Editing a Fax Library](#)" on page 6-38.

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, and do one of the following:
 - Select the Fax Response for this project by clicking the box next to its name.
 - To assign all faxes to the project, click All.
 - 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.

1. Set Outcomes as a requirement for agents.
For more information on setting outcomes as requirements for agents, see "[About the Outcome Library and Using Interaction Outcomes](#)" on page 6-54.
2. Create one or more outcomes.
For more information on outcomes, see "[Adding or Editing Interaction Outcomes and Callbacks](#)" on page 6-55.
3. Add the required outcomes to the project.
For more information on adding outcomes to a project, see "[Adding Interaction Outcomes to a Project](#)" on page 15-21.

Complete the following task to add interaction outcomes to a project.

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, and do one of the following:
 - To select an outcome for this project, select the box next to its name.
 - To assign all outcomes to the project, click All.
 - To remove all outcomes from the project, click Clear.
3. Click OK.

Overriding Workgroup Prompts for the Project

When Oracle Contact On Demand routes a phone customer to a workgroup queue, the caller is greeted, and keeps the caller informed with recorded prompts while the caller waits to be connected to an agent. Identify the workgroup prompts to play for the caller when setting up the workgroup. For more information on workgroups, see ["Setting Workgroup Options"](#) on page 10-5.

For each project, Administration Manager 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. Click Options, Projects, the project that you want to edit, and then click Edit.

The Edit Projects screen appears.

2. Click the Workgroup Prompts tab.
3. Complete the fields, and then click OK.

The following table describes the fields.

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 list, select the initial greeting Oracle Contact On Demand plays the caller when entering the workgroup.
Ring	From the list, select the prompt that Oracle Contact On Demand plays when an agent becomes available, and while the caller is being connected to the agent.
Hold	From the list, select the message that Oracle Contact On Demand plays for the caller while the caller waits to be connected to an agent. Note: Oracle Contact On Demand does not play this prompt until after the prompt selected for Music finishes playing.
Music	From the list, select the prompt that Oracle Contact On Demand 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. Oracle Contact On Demand then cycles the music and hold prompts continuously until an agent becomes available.

4. Repeat Steps 1 through 3 to customize the prompts in other projects.

About Contact Templates

Every project uses a contact template. For information on templates in general (and particularly contact templates), see ["About Default Display Templates Library"](#) on page 6-2.

Oracle Contact On Demand 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.

When uploading a dialer list to a project, you must give Administration Manager some information about what the dialer list looks like. Provide information about the dialer list by associating (or mapping) the columns in the dialer list with the fields in

the contact template. This mapping allows Administration Manager to do some intelligent processing of the dialer list. For example, mapping allows Oracle Contact On Demand to determine that one or more columns in the dialer list contain phone numbers, which are processed differently than other data. For more information on contact management, see *Oracle Contact On Demand Interaction Manager Guide*.

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 during a week or a 24-hour day. It includes the following topic:

- [Adding or Editing Project Schedules](#)

Note: Before creating Project Schedules, projects must already exist. For information on how to set up projects, see "[Adding or Editing a Project Definition](#)" on page 15-1.

Adding or Editing Project Schedules

Project schedules enable you to tailor call-routing strategies for your contact center.

To add or edit a project schedule

1. Click Options, and then Schedules.
2. Do one of the following:
 - To add a new project schedule, click Add.
 - To edit an existing project schedule, select the schedule that you want to edit from the list, and click Edit.
3. Complete the fields.

The following table describes the fields.

Field	Description
Schedule Name	Type a name for the schedule.
Description	Type a description (or purpose) of this schedule.
Select default Project	From the list, select the project definition to disable when the scheduled project starts.
Phone	From the list, select the country code and phone number to assign to the scheduled project (see the Select Scheduled Project field). This phone number replaces the placeholder or empty phone number supplied when defining this project. For more information on project scheduling, see " Setting Up Shared-Number Phone Projects for Scheduling " on page 15-7.

Field	Description
Select Scheduled Project	From the 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.
Select Time Zone	From the list, choose the time zone to use when starting the scheduled project. Oracle Contact On Demand begins running the scheduled project at the Start time (see the Start time field) in this time zone.
Start time	From the 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). Oracle Contact On Demand starts the scheduled project at the specified start time on the days selected (see the Monday, Tuesday.... field).
Monday, Tuesday....	Select the days that you want to run the scheduled project.

4. Click Apply to save the schedule.
5. Repeat Steps 2 through 4 of this procedure to finish creating schedules.
6. Click OK.

Oracle Contact On Demand 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, you must create a minimum of two schedules to switch between projects.

Scenario for Project Scheduling

One common use of the Oracle Contact On Demand scheduling capabilities is the routing of after-hours calls directly to voice mail instead of routing to agents who have gone home for the night.

Table 16-1 describes two schedules managing two different routing strategies for Jay's Unicycle Company.

Table 16-1 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 Voice Mail	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 voice mail 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 Voice Mail project, which routes callers directly to the voice mail system during non-business hours (Monday - Thursday, 05:01 P.M. - 08:59 A.M. and Friday, 05:01 P.M. - Monday, 08:59 A.M.).

The Nights and Weekends schedule specifies Sales Voice Mail as the Scheduled project; that is, the schedule runs at the specified time on each selected day of the week. The Nights and Weekends schedule continues to run the Sales Voice Mail project until another schedule starts and supersedes it.

To stop routing calls to voice mail 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.

Prioritizing Phone Customers

This chapter describes how to prioritize phone customers so that Oracle Contact On Demand handles the most important callers first. It includes the following topics:

- [About Assigning Priority Levels to Customers](#)
- [Setting Customer Priority](#)
- [Enabling Customer Priority for a Project](#)
- [Identifiers for Customers](#)

About Assigning Priority Levels to Customers

As Oracle Contact On Demand routes callers to workgroup queues and then agents, it uses the customer's priority level to determine the customer's position in the queue. Oracle Contact On Demand places callers with higher priority nearer to the front of the queue than customers with lower priority.

Customer priority affects only the interactions that are routed through a workgroup. For example, if your contact center has agents who receive direct inbound calls, customer priority is circumvented because Oracle Contact On Demand does not control direct inbound calls.

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

If there are two customers with different priority levels and a shared phone number, Oracle Contact On Demand cannot identify the customer. In this case, Oracle Contact On Demand sets the priority of both customers to the level assigned to the first record in the database that matches the detected phone number.

Note: When possible, use Customer ID information that is unique to each customer. This ID helps Oracle Contact On Demand to 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, then Customer Priority.
2. Do one of the following:
 - To add a new customer priority, click Add.
 - To edit an existing customer priority, select the customer from the list, and click Edit.

The Customer Priority screen opens.

3. Complete the fields with the information Oracle Contact On Demand uses to identify the customer for prioritization, and then click OK.

The following table describes the fields.

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. The customer's ID, and not the customer's area code or phone number, determines the customer's priority.
Country Code	From the 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. Oracle Contact On Demand routes callers to agents based on this priority. Note: If a customer does not have a priority, Oracle Contact On Demand assigns the customer the default standard priority.

Enabling Customer Priority for a Project

After creating Customer Priorities, edit each project that uses those priorities. Enable customer priority for a project.

To enable customer priority for a project

1. Click Options, Projects, the Phone tab, and the Options subtab.
2. Select the Enable Customer Priority Rating option.

Identifiers for Customers

To prioritize a phone customer, Oracle Contact On Demand must be able to match the caller's Customer ID or phone number. 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 15-3.

Table 17-1 lists the identifiers, and explains how they are used.

Table 17-1 Identifiers for Customers

Identifier	Method of Obtaining Identifier
Customer ID	You must configure Oracle Contact On Demand to ask customers to identify themselves by entering the ID number.

Table 17–1 (Cont.) Identifiers for Customers

Identifier	Method of Obtaining Identifier
Phone Number	If no Customer ID number is available, Oracle Contact On Demand tries to identify the customer using the phone number: <ul style="list-style-type: none"><li data-bbox="578 327 1370 380">■ Oracle Contact On Demand can automatically detect the caller's phone number as long as the caller did not block it.<li data-bbox="578 394 1419 443">■ If Oracle Contact On Demand cannot detect the caller's phone number, you must ask the customer to enter the phone number.

Note: Customer priority levels take precedence over project priority levels. If customer prioritization is enabled, Oracle Contact On Demand always prioritizes the interaction by using a customer priority level, not a project priority level.

Managing Mail Interactions

This chapter describes how to troubleshoot the mail interactions in your contact center by listing details for failed email messages, and by correcting and re-sending the messages. It includes the following topics:

- [About Mail Interactions](#)
- [Troubleshooting Emails](#)
- [Viewing Mail Interactions](#)
- [Correcting Emails](#)
- [Deleting Mail Interactions](#)

About Mail Interactions

A mail interaction can be an email or a voice mail. Oracle Contact On Demand works with mail interactions by taking account of the following:

- The number of email and voice mail interactions an agent is configured to receive
- Whether the email and voice mail interactions are in the active interaction window in Interaction Manager

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 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 simultaneously, 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 recommended 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. 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, Oracle Contact On Demand automatically sends the email to another agent. (The response time is a configuration setting.) If Oracle

Contact On Demand forwards the email to another agent, and the other agent responds prior to the original agent, then the Email Distributor intercepts the second message, and deletes it.

Troubleshooting Emails

Use Administration Manager to troubleshoot your contact center's email client by listing the details of failed email messages and by correcting and re-sending 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 re-send the email.

Note: Mail Manager reports any failed communications that move through the contact center using the email client (voice mails, faxes, and so on).

Viewing Mail Interactions

Use Administration Manager to view the following types of mail interactions:

- All emails and voice mails
- Emails and voice mails with errors
- Corrected emails and voice mails now pending (waiting to be sent)
- Corrected and sent emails and voice mails

To view mail interactions

1. Click Options, and then Mail Manager.

A list of mail interactions appears. The default is to view All mail interactions.

Note: The retrieval limit is a maximum of 500 mail interactions.

2. You can select one of the filter methods from the list to view only the selected email messages:
 - From the Show 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. These email messages are those emails resent by the Unified Messenger (those with errors and resent successfully) and not from the Email Distributor (all sent emails for an email project).
 - To search for mail interactions:
 - Click a letter or number at the top of the screen.
 - Click Remove Filter to go back to the list of all mail interactions.
 - Enter a string in the Find box.
 - Click Go.

When using the Find field (or when clicking a letter or number at the top of the screen), Administration Manager searches the currently selected column. For example, if you click the Recipient column, and then click the letter A, Oracle Contact On Demand shows only mail interactions where the recipient address begins with the letter A.

The same is true when typing a string in the Find field. If you click the Originator column, and then enter *Steve* in the Find field, Oracle Contact On Demand shows only the mail interactions where the originator address begins with the string *steve*.

Note: The Find field is not case sensitive.

The Find field also supports the percent sign (%) as a wildcard character. 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 email 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.

- To sort the list based on the contents of a column, click the column header.
- Click Refresh to update the list with current information.
- Click the mail interaction to view, and then click View/Edit.
The Edit Mail screen appears.
- Use the following table to understand the attributes of the mail, and then 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 email message.
File	Name of the text file into which the mail was converted for handling by Oracle Contact On Demand.
File Path	Location in which the mail file is stored for processing.
Error Message	Describes the error.

Correcting Emails

If an email did not reach its intended recipient (due to an 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 re-send them

1. Display all emails with errors.

For more information on emails, see "[Viewing Mail Interactions](#)" on page 18-2.

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 then click OK.

Oracle Contact On Demand moves the email into the Mail Pending group and queues the message for re-sending.

Deleting Mail Interactions

You can delete failed mail interactions from the Mail with Errors group and from the Mail Already Sent group.

Deleting a Single Mail Interaction

This topic describes how to delete a single mail interaction.

To delete a single mail interaction

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.
4. When a confirmation message appears, click OK.

Deleting All Mail Interactions

This topic describes how to delete 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.
3. When a confirmation message appears, click OK.

Call Blocking

This chapter describes how to use call blocking to prevent agents and the Oracle Contact On Demand automated callback features from calling specific phone numbers. It includes the following topics:

- [About Call Blocking](#)
- [Adding or Editing 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
- Preview calls

When an agent tries to call a blocked number, Interaction Manager 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, Oracle Contact On Demand 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.

Adding or Editing 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 add or edit a call-blocking list

1. Click Options, and then Call Blocking.

Oracle Contact On Demand 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: Only an administrator can edit this pattern.

2. Click Add.

The Add Call Blocking screen appears.

3. Complete the fields, and click Apply.

The following table describes the fields.

Field	Description
Country	From the list, select a country code to block. Oracle Contact On Demand blocks all call attempts to the numbers specified in the Phone 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, type the number, as shown. Note: This pattern blocks only calls placed to this specific number. Use the asterisk (*) as a 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 (?) as a wildcard character 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 Oracle Contact On Demand automated callback system) from placing calls to numbers matching the specified pattern. Clear this option to allow outbound calls to numbers matching the pattern. (This feature also applies to preview calls.)

4. Click Apply.

5. Repeat Steps 2 through 4 for all the patterns that you want to block, and then click OK.

Working with Standard Reports

This chapter describes the standard reports that are available for you to create. The reports help you to view and understand contact center trends, activities, and agent performance. This chapter includes the following topics:

- [Standard Reports](#)
- [Viewing Standard Reports](#)
- [Adding or Editing Standard Reports](#)
- [Deleting a Standard Report](#)
- [Setting the Standard Report Regional Options](#)
- [Identifying Standard Report Contents](#)
- [Determining the Standard Report Layout](#)
- [Selecting an Output Format for Standard Reports](#)
- [Scheduling a Standard Report](#)
- [Identifying Who Can Access Standard Reports](#)
- [Contact Center Operations Reports](#)
- [Workgroup Productivity Reports](#)
- [Preview Report](#)
- [Agent Profile and Productivity Reports](#)
- [Project Segments Report](#)
- [Network Traffic Report](#)
- [Tenant Summary View](#)

Standard Reports

You can create and view standard reports to help you understand the key performance indicators to help you more efficiently manage your contact center.

This topic includes the following:

- ["List of Standard Reports"](#) on page 20-2
- ["Common Standard Report Items"](#) on page 20-3

List of Standard Reports

[Table 20-1](#) provides a list of all the standard reports available from Administration Manager by report group.

Note: The specific reports that you can access depend on how Oracle Contact On Demand is configured. Therefore, you might not see all of the reports described.

Table 20-1 Administration Manager Standard Reports

Report Name	Description
Contact Center Operations	
Weekly Project Routing Schedule	Lists all of the schedules defined for your contact center for Dialed Number Identification Service (DNIS) routing.
Workgroup Skills	Displays the skills assigned to a workgroup and the rating of those skills.
Billing	Summarizes the number and duration of interactions in each contact center for which you provide a service.
Workgroup Productivity	
Workgroup Segments	(Formerly named Workgroup Key Statistics) Shows statistics that help you understand the performance of each workgroup in your contact center.
Workgroup Interval Time	Shows how your workgroups are performing at specific times of the day.
Workgroup Interval Time by Media	Shows how many interactions of each media type your contact center receives at specific times of the day.
Outcome Statistics	Allows you to track the results of interactions based on the interaction type (ACD call, Web callback, and so on).
Overdue Callbacks	Lists all waiting Web callback interactions
Preview Report	
Preview Summary	Displays a breakdown of the preview results based on the call attempts.
Agent Profile and Productivity	
Agent Information	Displays profile information (extension, email address, and so on) for agents.
Agent Interaction	Displays details about the number and duration of the selected interaction type for the selected agents.
Agent Skills	Lists all the skills defined for your company, and indicates which agents possess that skill and their rating for the skill. Shows you which agents possess each skill in your contact center.
Agent Utilization	Lets you analyze agent activity by showing the amount of time each agent spent handling interactions, awaiting interactions, or on break.
Direct Dialing Statistics	Shows the statistics for the calls dialed directly to agents, or dialed by agents to external numbers.
Login by Groups of Users	Displays the agents who logged in, the login time, and login duration.

Table 20–1 (Cont.) Administration Manager Standard Reports

Report Name	Description
Login by User	Provides information about the login activity for each of your agents.
Project	
Project Segments	(Formerly named Project Key Statistics) Shows a set of interaction statistics, broken down by interaction type (phone, email, and so on), and as a summary across all interaction types.
Network Traffic	
Call Details	Provides detailed information about all calls coming into the contact center. This information is helpful when you are tracking and researching call and telephone company (telco) billing issues. Note: This report is available only from Administration Manager.

Common Standard Report Items

Table 20–2 lists the items that most, but not all, standard reports have in common, and describes each item.

Table 20–2 Example Standard Report Common Items

Item	Description
Report Name	The name of the report followed by a user-defined name.
Report Includes XXX	Shows the subjects of the report (such as workgroups, Oracle Contact On Demand users, prospects, and so on).
Generated date and time	The day (mm/dd/yyyy) and time (hh:mm:ss A.M. or P.M.) when this report was generated. Note: The date format can vary. It depends on the default settings for the report, or user selections when users view the report.
Time Zone	The time zone used to generate the report.
Report Date Range to Include	Shows the period of the report from one date (dd/mm/yyyy) and time (hh:mm:ss) to another date (dd/mm/yyyy) and time (hh:mm:ss).

Viewing Standard Reports

You can view existing standard reports. However, you must be an administrator to create new reports.

Note: If you want a new report, or want to change a report, contact your administrator.

To view a standard report

1. Click the Reporting tab.
2. Click the Reports menu.
3. Double-click the Reports menu to open one of the report groups (such as Agent Profiles & Productivity).

4. Double-click a report name (such as Agent Skills) to open a list of available reports.

Note: This list includes reports that your administrator previously created and granted you permission to view. If the report name is not expandable, there are no available reports for that report type.

When an administrator creates a report, the administrator usually sets some configuration options on the report. The configuration options depend on the specific report.

For example, your administrator can configure the Workgroup Segments report to show statistics on workgroups or statistics on projects. The administrator can also configure this report to show only one workgroup or all workgroups. In addition, the administrator can control which types of interactions to include, and which to ignore (such as including calls, chats, and emails, and ignoring faxes).

Scheduling a Standard Report and Selecting Regional Options

The following topic describes how to schedule a standard report and how to select regional options.

To schedule a standard report and to select regional options

1. Click a report name.

The Report window opens.

Note: Depending on what type of report you are viewing, you might see a Covered Period tab, a Regional Options tab, or both.

2. On the Period Covered tab, select the start and end dates, and the start and end times.

The following table describes the fields and controls.

Field	Description
Start Date	<p>Click the calendar icon to open a calendar from which you can choose the start date of the report range:</p> <ul style="list-style-type: none"> ▪ Click the right-angle bracket (>) or the left-angle bracket (<) to advance or move back the calendar one month. ▪ Click the right, double-angle brackets (>>) or the left, double-angle brackets (<<) to advance or move back the calendar one year. <p>Choose the report start date by clicking a day in the calendar, or click today to choose today's date (based on your workstation's system clock).</p> <p>You can also type a date in the field, using the mm/dd/yyyy format:</p> <ul style="list-style-type: none"> ▪ From the first list, select the starting hour (24-hour notation). ▪ From the second list, select the starting minutes. <p>For more information about the calendar, see "Selecting a Date from the Calendar" on page 20-5.</p>

Field	Description
End Date	<p>Click the calendar icon to open a calendar from which you can choose the end date of the report range:</p> <ul style="list-style-type: none"> Click the right-angle bracket (>) or the left-angle bracket (<) to advance or move back the calendar one month. Click the right, double-angle brackets (>>) or the left, double-angle brackets (<<) to advance or move back the calendar one year. <p>Choose the report end date by clicking a day in the calendar. Or, click today to choose today's date (based on your workstation's system clock).</p> <p>You can also type a date in the field, using the mm/dd/yyyy format:</p> <ul style="list-style-type: none"> From the first list, select the closing hour (24-hour notation). From the second list, select the closing minute.
Start Time	From the lists, choose the starting hour (24-hour notation) and minute for your report range.
End Time	From the lists, choose the closing hour (24-hour notation) and minute for your report range.

3. Click the Regional Options tab, and complete the Regional Options tab fields.

The following table describes the fields for selecting regional options.

Field	Description
Display Time	<p>Do one of the following:</p> <ul style="list-style-type: none"> Choose Company Default Time Zone to display all report times in the time zone defined as the default for your company. Choose User Time Zone to display all report times in the time zone configured for your Oracle Contact On Demand workstation.
Report Language	From the list, select the language in which you want the report to appear.
Select Date Format to Display in Report	<p>Do one of the following:</p> <ul style="list-style-type: none"> Choose Company Default Date Format to display all report dates in the format defined as the default for your company. Choose User Defined Date Format to display all report dates in the format configured for your Oracle Contact On Demand workstation.

4. Click OK.

A new browser window opens containing the report.

Selecting a Date from the Calendar

Many Oracle Contact On Demand screens include a calendar icon to help you to select a date (for example, when creating search parameters for finding a specific interaction stored in the Oracle Contact On Demand database). The following topic helps you to use the calendar feature.

To select a date from the calendar

1. Click the calendar icon to open a calendar.

On the calendar, the current month and year appear in the date box.

2. Do the following to select a different day or month:

- Click the arrows to advance or move back the calendar one month.
- From the list, select a different month-year combination from the list.
- Click a day of the week for the date.

The calendar closes automatically after a day is selected.

Note: To close the calendar manually, click Close.

Report Start and End Times

For almost every report, the start and end times work in the same way. For example, if you are running an Agent Utilization report, you might select:

- 07/01/08 as the start date
- 07/30/08 as the end date
- 8:00 (A.M.) as the start time
- 17:00 (5:00 P.M.) as the end time

Your report includes events:

- Starting at 8:00 A.M. on 7/01/08
- Closing at 5:00 P.M. on 07/30/08

Any event that occurred between those times, 24 hours a day, seven days a week, is included in your report. Each report works in this way, with the following exceptions:

- Workgroup Interval Time Report
- Workgroup Interval Time by Media Report
- Advanced Report Templates

If you run these reports, and select the same start and end times, listed in the previous example, your report includes events that occurred between 8:00 A.M. and 5:00 P.M., each day between 7 January 2007 and 30 July 2007.

Adding or Editing Standard Reports

This topic describes how to add new standard reports or edit existing standard reports.

Note: Only administrators can create reports.

Adding a New Standard Report

The following topic describes how to add a new standard report.

To add a new standard report

1. Click Reports.
2. Click the report category (such as Contact Center Operations) containing the report type to which you want to add a new report.
3. Click the report type to which you want to add a new report.
4. Click Add.

5. In the Name tab, provide a name for your report and (optionally) a description of your new report.
6. In the Content tab (if enabled), select the options for the content that you want to include in your report.
7. In the layout tab (if enabled), determine the column order for your report.
8. Complete the Regional Options tab fields.
9. In the Permissions tab (if enabled), select who can view your new report.
10. In the Schedule Report tab, do the following:
 - a. Click the Enable Report scheduling option.
 - b. Select Daily, Weekly, or Monthly, add email addresses to the To and From fields.
 - c. Select the SMTP group to send the report.

These groups are configured as part of Oracle Contact On Demand setup for libraries. For more information, see "[Adding or Editing an SMTP Groups Library](#)" on page 6-49.

Note: You can enter a maximum of 2048 characters in the To field and a maximum of 128 characters in the From field.

11. Click OK.

Editing an Existing Standard Report

Only administrators can edit a standard report.

To edit a standard report

1. Click Reports.
2. Click the report category (such as Contact Center Operations) containing the report you want to edit.
3. Click a report name (such as Workgroup Skills) to open a list of available reports.

Note: This list includes reports your administrator previously created and granted you permission to view. If the report name is not expandable, there are no available reports for that report type.

4. From the list of available reports, click the report you want to edit, and click Edit.
5. In the Name tab, edit the report name, and (optionally) the description of the report.
6. In the Content tab (if enabled), select the options for the content that you want to include in your report.

You can select multiple options, but your option selections do not change the format of the report. If you select an option for data that is not included in the report format, the report will contain incorrect results.
7. In the layout tab (if enabled), edit the column order for your report.
8. Complete the Regional Options tab fields.

9. In the Permissions tab (if enabled), select who can view the report.
10. In the Schedule Report tab, click the Enable Report Scheduling box, select Daily, Weekly, or Monthly, add email addresses to the To and From fields, and select the SMTP group to send the report.

These groups are configured as part of Oracle Contact On Demand setup for libraries. For more information, see ["Adding or Editing an SMTP Groups Library"](#) on page 6-49.

Note: You can enter a maximum of 2048 characters in the To field and a maximum of 128 characters in the From field.

11. Click OK.

Deleting a Standard Report

Administration Manager allows you to create and delete many objects, such as workgroups, data sources, companies, projects, agents, and so on. Deleting unused objects creates space in the Oracle Contact On Demand database, however, the deleted objects remain in the database so that historical data can be captured in reports. For example, if you delete a workgroup on 14 April, and then run a report that shows workgroup activity dating back to 1 April, the report will show the activity from the deleted workgroup.

This topic describes how to delete a standard report.

To delete a standard report

1. Click Reports.
2. Click the report category (such as Contact Center Operations) containing the report that you want to delete.
3. Click a report type, for example, Billing report, to access a list of reports of that type.
4. Right-click the report that you want to delete.
5. Select Delete from the menu, and then click OK to confirm the deletion.

Note: You can also select a report, and then click Delete.

Setting the Standard Report Regional Options

This topic describes how to set the standard report display time, the language, and the format.

To identify the standard report display time, the language, and format

1. Click the Regional Options tab.
2. Complete the fields to select a time zone, report language, and report format.

Note: This screen is identical for all reports.

The following table describes the Regional Options tab fields.

Field	Description
Display Time	Do one of the following: <ul style="list-style-type: none"> Choose Company Default Time Zone to display all report times in the time zone defined as the default for your company. Choose User Time Zone to display all report times in the time zone configured for your Oracle Contact On Demand workstation.
Report Language	From the list, select the language in which you want the report to appear.
Select Date Format to Display in Report	Do one of the following: <ul style="list-style-type: none"> Choose Company Default Date Format to display all report dates in the format defined as the default for your company. Choose User Defined Date Format to display all report dates in the format configured for your Oracle Contact On Demand workstation.

Identifying Standard Report Contents

This topic describes how to identify the contents of a standard report. For more information, see ["Viewing Standard Reports"](#) on page 20-3.

To identify standard reports content

- Click the Content tab.

The items that display in the Content tab vary and depend on the report that you selected.

Determining the Standard Report Layout

This topic describes how to select the elements in your report and how to organize the column order of the report.

Note: Not all reports utilize the Layout tab.

To determine the standard report layout

- Click the Layout tab.
- Move the report elements that you want to use in your report from the Elements column to the Define Column Display Order column.
- In the Define Column Display Order column, use the up and down arrows to determine the element order, and then click OK.

Note: The order in which you designate the elements in this task determines the column order in the report.

Selecting an Output Format for Standard Reports

For the majority of standard reports there are a number of output options. You can choose the following formats for reports:

- HTML (.html)

- Adobe PDF (.PDF)
- Microsoft Excel (.XLS)
- Comma-Separated Values (.CSV)

To select options for HTML, PDF, XLS or CSV output

1. Click the Output Format tab.
2. Choose the output format for the report, and then click OK.

Scheduling a Standard Report

Before using the scheduling feature the first time, you must make some minor edits to the report.xml file. For more information, see "[Configuring the Report.xml File](#)" on page 21-11.

To schedule a standard report

1. Click the Schedule Report tab.

This tab allows you to:

- Schedule reports to run automatically.
- Schedule reports during selected periods.
- Schedule reports to be sent automatically to one or more email addresses.

Note: Oracle Contact On Demand generates all scheduled reports at midnight, according to company itemizing.

2. Select the Enable Report Scheduling option.

The following figure shows the options that appear on the screen.

3. Select one reporting period from the following list:

- **Daily.** Provides statistics for a 24-hour period between midnight and midnight daily.
- **Weekly.** Shows information from Sunday at 12:00 A.M. to the following Saturday at 11:59 P.M.
- **Monthly.** Provides information for a complete month.

4. In the fields, do the following:

- In the To field, separate multiple email addresses with a semi-colon (;).

For example:

`brice@indy500.com;gdefarran@indy500.com`

Note: You can enter a maximum of 2048 characters in the To field.

- In the From field, enter one or more email addresses where you want Oracle Contact On Demand to send the report.

The person who receives the report sees this address in the reply email they receive.

Note: You can enter a maximum of 128 characters in the From field.

- From the Select an SMTP Group list, select a group.

These groups are configured as part of Oracle Contact On Demand setup for libraries. For more information, see "[Adding or Editing a Prefix Routing Group Library](#)" on page 6-46.

Identifying Who Can Access Standard Reports

In most cases, you can decide which individual supervisor can access a report. However, because some reports are not available to supervisors, a Permissions tab is not available.

To identify who can access standard reports

1. Click the Permissions tab to identify who can access this report.

Note: All Permissions screens work the same way. However, the exact content varies, because it depends on who can access Oracle Contact On Demand.

2. Do one of the following:

- Click the any Supervisor option.

This option allows any supervisor logged in to Oracle Contact On Demand to run and view this report.

- Click the following Supervisors option.

This option grants permission only to the supervisors whom you select in the Select list.

3. Click OK.

The report appears in a browser window.

Contact Center Operations Reports

This topic describes the operations reports. It includes the following information:

- "[Weekly Project Routing Schedules Report](#)" on page 20-11.
- "[Workgroup Skills Report](#)" on page 20-12.
- "[Billing Report](#)" on page 20-12.

Weekly Project Routing Schedules Report

The Weekly Project Routing Schedules report lists all project schedules and operating hours for your contact center, as configured by an administrator using Administration Manager.

Note: When a company is using Campaign Manager for its call workflow, then the company typically uses business events to define the company's operating hours.

[Table 20-3](#) describes the Weekly Project Routing Schedules report, the columns, and their corresponding tables.

Table 20-3 Weekly Project Routing Schedules Report

Column	Description	Table
Day	The routing day.	Not applicable.
DNIS	(Dialed Number Identification Service) The telephone number or email address customers use to reach the scheduled project.	LibraryDNIS
From Project	The project that the schedule temporarily disables while the <i>To Project</i> runs.	Corresponding tables include: <ul style="list-style-type: none"> ▪ ReportsWeeklyRouting ▪ hasfromproject
Start Time	The time (24-hour clock) on the specified day the project is scheduled to start.	Not applicable.
Time Zone	The time zone used to generate the report. The values in the Start Time column are for this time zone.	Corresponding tables include: <ul style="list-style-type: none"> ▪ ReportsWeeklyRouting ▪ hastimezone
To Project	The name of the project that the schedule runs at the specified day and start time.	Corresponding tables include: <ul style="list-style-type: none"> ▪ ReportsWeeklyRouting ▪ hastoproject

Workgroup Skills Report

The Workgroup Skills report shows the skills assigned to a workgroup. The report shows all agents for the entire company, not only the agents whom you supervise.

[Table 20-4](#) describes the Workgroup Skills report, the columns, and their corresponding tables.

Table 20-4 Workgroup Skills Report

Column	Description	Table
Rating	The rating (weight) of this skill (from 0 to 100) regarding its importance to this workgroup. The higher the rating, Oracle Contact On Demand is more likely to route an interaction to this workgroup.	Workgroupskill <ul style="list-style-type: none"> ▪ skillvalue
Skill Name	The name of the skill required in this workgroup.	Workgroupskill <ul style="list-style-type: none"> ▪ skillid
Workgroup	The name of the workgroup.	Workgroupskill <ul style="list-style-type: none"> ▪ workgroupid

Billing Report

The Billing report summarizes the number and duration of interactions in each contact center for which you provide a service.

[Table 20-5](#) describes the Billing report.

Table 20–5 Billing Report

Column	Description
call center	The name of the contact center.
Number of Interactions	The total number of interactions for the date and time specified, where each leg of an interaction increments the count by one.
Duration of Interactions	The total time for all interactions in the date and time specified.
Total	The total number of interactions and times for all interactions for the contact center for the dates and times specified.

Workgroup Productivity Reports

This topic describes the workgroup productivity reports. It includes the following information:

- ["Outcome Statistics Report"](#) on page 20-13
- ["Workgroup Interval Time by Media Report"](#) on page 20-15
- ["Workgroup Segments Report"](#) on page 20-16
- ["Overdue Callbacks Report"](#) on page 20-22
- ["Workgroup Interval Time Report"](#) on page 20-23

Outcome Statistics Report

For each interaction type, the Outcome Statistics report shows the number of interactions that were assigned an outcome by agents at the end of each interaction. You can use this report to track the results of interactions based on the interaction type.

Note: This report is available only if outcomes are defined.

[Table 20–6](#) describes the Outcome Statistics report and the corresponding tables.

Table 20–6 Outcome Statistics Report

Column	Description	Table
Callback	The number of ACD workgroup callback interactions that were assigned this outcome.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsOutcomes ■ HasCallback
Chat	The number of chat interactions that were assigned this outcome.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsOutcomes ■ HasACDChats

Table 20–6 (Cont.) Outcome Statistics Report

Column	Description	Table
Outbound	The number of outbound interactions that were assigned this outcome by agents.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsOutcomes ■ HasOutbound
Outcome	Administrators can create a list of outcomes to describe the result of an interaction. Whether an agent is required to select an outcome is decided by the administrator. Example outcomes might include: Sale, Request for Literature, Request for Product Change, Order Pending, Order Placed, and so on.	Not applicable.
Preview	The number of preview interactions that were assigned this outcome by agents.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsOutcomes ■ HasPreview
Web Callback	This report shows how many Web callback interactions that were assigned this outcome by agents.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsOutcomes ■ HasWebCallback
Workgroup Calls	This report shows how many inbound telephone call interactions (routed to a workgroup) that were assigned this outcome by agents.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsOutcomes ■ HasACDCalls
Workgroup Emails	This report shows how many workgroup email interactions that were assigned this outcome by agents.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsOutcomes ■ HasEmails
Workgroup Fax	This report shows how many workgroup fax interactions that were assigned this outcome by agents.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsOutcomes ■ HasFaxes
Workgroup Voicemail	This report shows how many workgroup voice mail interactions that were assigned this outcome by agents.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsOutcomes ■ HasVoicemails

Table 20–6 (Cont.) Outcome Statistics Report

Column	Description	Table
Total	The total number of interactions assigned this outcome.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsOutcomes ■ HasACDCalls

Workgroup Interval Time by Media Report

The Workgroup Interval Time by Media Type report shows how many interactions of each media type your contact center receives at specific times of the day, during a specified period.

Each row of the report is dedicated to a single time interval, based on the value your administrator set up for this report. Therefore, selecting a start and end time for this report is slightly different from the procedure for other reports. For more information, see "[Report Start and End Times](#)" on page 20-6.

[Table 20–7](#) describes the Workgroup Interval Time by Media report and the corresponding tables.

Table 20–7 Workgroup Interval Time by Media Report

Column	Description	Table
Callback	The number of callback interactions that agents accepted.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsACDInterval ■ HasCallback
Chat	The number of chat interactions that agents accepted.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsACDInterval ■ HasACDChat
Interval	The period of the report. You can set the length for each interval in the Set Interval Time field on the Content tab when creating the report definition. The total number of rows in the report is based on your specified Interval Time and the period of your report. For example, the report would contain eight rows if the report was created for the period between 2:00 P.M. and 4:00 P.M. for a single day with interval times of 15 minutes.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsACDInterval ■ TimeInterval
Total	The total number of interactions received for the entire period. Note: The total interaction count does not increment unless an agent accepts the interaction.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsACDInterval ■ HasTotInteractions
Total	The total number of interactions received for each time interval. Note: The total interaction count does not increment unless an agent accepts the interaction.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsACDInterval ■ HasTotIntervalInteractions

Table 20–7 (Cont.) Workgroup Interval Time by Media Report

Column	Description	Table
Web Callback	This report shows how many Web callback interactions were accepted by agents.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsACDInterval ■ HasWebCallback
Workgroup Calls	This report shows how many inbound telephone call interactions (routed to a workgroup) were accepted by agents.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsACDInterval ■ HasACDCalls
Workgroup Email	This report shows how many workgroup email interactions were accepted by agents.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsACDInterval ■ HasACDEmail
Workgroup Fax	This report shows how many workgroup fax interactions this agent handled.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsACDInterval ■ HasACDFax
Workgroup Voicemail	This report shows how many workgroup voice mail interactions were accepted by agents.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsACDInterval ■ HasACDVoicemail

Workgroup Segments Report

The Workgroup Segments report shows contact center use and agent performance for the projects and workgroups that you select. It includes the activity for all agents in a project or workgroup. This report includes interactions that were routed to workgroup agents by Automatic Call Distribution (ACD). This report does not include:

- Calls made directly to an agent
- Outbound calls made by an agent

This report contains the following information:

- ["Segment Events Area"](#) on page 20-17
- ["Abandoned Interval Area"](#) on page 20-18
- ["Agent Answered Interval Area"](#) on page 20-18
- ["Media Type Segments Handled Area"](#) on page 20-20
- ["Agent Segment Processing Area"](#) on page 20-20
- ["Summary Area"](#) on page 20-21

Note: This report was formerly called: Workgroup Key Statistics report.

Segment Events Area

The *Segment Events* area shows information for interactions received by the contact center.

[Table 20–8](#) describes the Segment Event area of the Workgroup Segments report.

Table 20–8 *Workgroup Segments Report: Segment Events Area*

Column	Description	Table
Abandoned	The number of workgroup interactions received by the contact center, but abandoned by the customer before being accepted by an agent.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions ■ TimetoAbandoned
Agent Answered	The number of workgroup interactions routed to and accepted by agents.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions ■ HasACDCalls ■ HasACDCallback ■ HasWebCB ■ HasVoicemail ■ HasChat ■ HasEmail ■ HasFax
Callback Calls	The number of callback and Web callback interactions handled by the contact center.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions ■ HasACDCallback ■ HasACDCalls
No Answer	The total number of interactions sent to, but not answered by an agent.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions
Other Events	The total number of events that overflowed to a project menu, or where the project results are <i>Other</i> .	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions
Other Workgroups	The total number of interactions routed to other workgroups.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions
Total Segments Received	The total number of interactions coming into the contact center and routed back from other workgroups. This total is larger than the total interactions on other reports because it includes interactions routed back from other workgroups.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions

Table 20–8 (Cont.) Workgroup Segments Report: Segment Events Area

Column	Description	Table
Voicemail	The number of calls in which the caller left a voice mail message for a workgroup agent, rather than wait in the queue to be connected to an agent.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions ■ HasVoicemail

Abandoned Interval Area

The *Abandoned Interval* area shows the statistics for the time that customers waited before deciding to abandon their attempt to reach your contact center.

[Table 20–9](#) describes the Abandoned Interval area of the Workgroup Segments report.

Table 20–9 Workgroup Segments Report: Abandoned Interval Area

Column	Description	Table
0 min 31 sec to 1 min 0 sec	The number of interactions abandoned after waiting 30 seconds, but no longer than 60 seconds.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ActionID ■ Duration
1 min 1 sec to 1 min 30 sec	The number of interactions abandoned after waiting 61 seconds, but no longer than 1 minute and 30 seconds.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ActionID ■ Duration
1 min 31 sec to 2 min	The number of interactions abandoned after waiting between 1 minute and 30 seconds and 2 minutes.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ActionID ■ Duration
Over 2 min 0 sec	The number of interactions abandoned after waiting more than 2 minutes.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ActionID ■ Duration
Under 0 min 30 Seconds	The number of interactions abandoned after waiting less than 30 seconds.	<ul style="list-style-type: none"> ■ Corresponding tables include: ■ HistoryActions ■ ActionID ■ Duration

Agent Answered Interval Area

The *Agent Answered Interval* area shows statistics for the time customers waited before being connected to an agent.

[Table 20–10](#) describes the entities of the Agent Answered Interval area of the Workgroup Segments report.

Table 20–10 Workgroup Segments Report: Agent Answered Interval Area

Column	Description	Table
Below Threshold 1	The total number of interactions that were accepted by an agent before the time limit expired. The value for Threshold 1 is defined in the Content tab of the report definition.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsCallCenterKey ■ CallThreshold1 ■ CallbackThreshold1 ■ WebCallbackThreshold1 ■ FaxesThreshold1 ■ EmailThreshold1 ■ ChatThreshold1
Below Threshold 2	The total number of interactions that were accepted by an agent before the time limit expired. The value for Threshold 2 is defined in the Content tab of the report definition.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsCallCenterKey ■ CallThreshold2 ■ CallbackThreshold2 ■ WebCallbackThreshold2 ■ FaxesThreshold2 ■ EmailThreshold2 ■ ChatThreshold2
Greater than Threshold 2	The total number of interactions that were accepted by an agent after the time limit expired. The value for Threshold 2 is defined in the Content tab of the report definition.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsCallCenterKey ■ CallThreshold2 ■ CallbackThreshold2 ■ WebCallbackThreshold2 ■ FaxesThreshold2 ■ EmailThreshold2 ■ ChatThreshold2
Total Segments Answered by Agent	The total number of interactions routed to and accepted by the workgroup agents.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsCallCenterKey ■ HasACDCalls ■ HasACDCallback ■ HasWebCB ■ HasVoicemail ■ HasChat ■ HasEmail ■ HasFax

Media Type Segments Handled Area

The *Media Type Segments Handled* area shows the number of interactions of each media type handled by the selected projects or workgroups.

[Table 20–11](#) describes the entities of the Media Type Segments area of the Workgroup Segments report.

Table 20–11 Workgroup Segments Report: Media Type Segments Area

Column	Description	Table
Callback	The number and percentage of interactions that reached the contact center by phone, were routed to a workgroup, and requested a callback rather than wait in the workgroup queue for an agent.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions
Chat	The number and percentage of customers who reached the contact center by requesting a chat with an agent using your Web site.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions
Web Callback	The number and percentage of customers who reached the contact center by requesting a callback from an agent using your Web site.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions
Workgroup Calls	The number and percentage of interactions that reached the contact center by phone, were routed to a workgroup, and subsequently handled by an agent. Note: This number does not include preview calls.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions
Workgroup Email	The number and percentage of interactions that reached the contact center by email, were routed to a workgroup, and subsequently handled by an agent.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions
Workgroup Fax	The number and percentage of fax interactions that were routed to a workgroup and subsequently handled by an agent.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions
Workgroup Voicemail	The number and percentage of interactions that reached the contact center by phone, were routed to a workgroup, and elected to leave a voice mail message rather than wait in the workgroup queue for an agent.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions

Agent Segment Processing Area

The *Agent Segment Processing* area shows the average time that agents spent in various phases of the interaction.

[Table 20–12](#) describes the Agent Segment Processing area of the Workgroup Segments report.

Table 20–12 Workgroup Segments Report: Agent Segment Processing Area

Column	Description	Table	Calculation
Average Handle Time per Segment	The average time that agents spent processing a call, (including talk time and wrap-up time), for the segment of the call, and for the reporting workgroup.	Corresponding tables include: <ul style="list-style-type: none"> ReportsCallCenterKey HistoryActions 	[(Total Talk Time) plus (Total Hold Time) plus (Total Wrap Time)] divided by (Total number of segments).
Average Hold Time (AHT)	The average time that agents kept callers on hold.	Corresponding tables include: <ul style="list-style-type: none"> ReportsCallCenterKey HistoryActions 	(Total Hold Time) divided by (number of segments that went on hold).
Average Speed of Answer (ASA)	The average time for agents to answer an interaction.	Corresponding tables include: <ul style="list-style-type: none"> ReportsCallCenterKey HistoryActions 	Not applicable.
Average Talk Time (ATT)	The average time that agents spent talking with callers, including hold time.	Corresponding tables include: <ul style="list-style-type: none"> ReportsCallCenterKey HistoryActions 	Not applicable.
Average Wrap Up Time	The average time that agents spent wrapping up interactions (where the agent status was wrap-up).	Corresponding tables include: <ul style="list-style-type: none"> ReportsCallCenterKey HistoryActions 	Not applicable.

Summary Area

The *Summary* area shows the overview data for interactions received and for interaction waiting times.

[Table 20–13](#) describes the Summary area of the Workgroup Segments report.

Table 20–13 Workgroup Segments Report: Summary Area

Column	Descriptions	Table	Calculation
Average Ring Time	The average ring time.	Corresponding tables include: <ul style="list-style-type: none"> ReportsCallCenterKey HistoryActions 	The total ring time divided by the number of calls offered to the agent.
Average Time to Abandoned	The average time before the interaction was abandoned for all segments of the interaction.	Corresponding tables include: <ul style="list-style-type: none"> ReportsCallCenterKey HistoryActions 	Not applicable.
Duration of Handled Segments	The total time that the interactions spent in Oracle Contact On Demand.	Corresponding tables include: <ul style="list-style-type: none"> ReportsCallCenterKey HistoryActions 	The difference between the time the interaction was received and the end of the interaction for the segment of the call for the report.

Table 20–13 (Cont.) Workgroup Segments Report: Summary Area

Column	Descriptions	Table	Calculation
Longest Wait to Answer Time	How long the interaction with the longest queue time waited for an agent.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions 	Not applicable.
Number of Times Interactions Went to Hold	The total number of voice interactions that an agent placed on hold at any time.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions 	Not applicable.
OverFlow In	The total number of ACD interactions that were answered in the overflow workgroup.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions 	Not applicable.
OverFlow Out	The total number of ACD interactions that overflowed to another workgroup.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions 	Not applicable.
Shortest Wait to Answer Time	How long the interaction with the shortest queue time waited for an agent.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions 	Not applicable.
Total Segments Answered by Agent	The total number of interactions received by Oracle Contact On Demand, routed to a workgroup, and handled by an agent.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions 	Not applicable.
Total Segments Received	The total number of interactions received by your workgroup or project.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions 	Not applicable.
Total Wait To Answer Time	The total time interactions spent waiting for an agent in a workgroup queue.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions 	Not applicable.
Transferred In	The number of interactions that entered the workgroup by way of a transfer.	Corresponding tables include: <ul style="list-style-type: none"> ■ ReportsCallCenterKey ■ HistoryActions 	Not applicable.

Overdue Callbacks Report

The Overdue Callbacks report lists all Web callback requests that have aged past the requestor's specified date and time. It shows the date and time that the customer requested the callback, as well as the customer's contact information. This report helps you to determine if interactions are overdue, recently overdue, or upcoming.

[Table 20–14](#) describes the Overdue Callbacks report.

Table 20–14 Overdue Callbacks Report

Column	Description
Customer Information	Information about the customer, including the customer's first name, last name, phone number, extension (where applicable), email address, company, and the customer's time zone.
Overdue	The customer has been waiting (for a requested callback) longer than the maximum, overdue threshold time.
Recently Overdue	The customer has been waiting (for a requested callback) longer than the overdue time, but has not yet waited longer than the maximum, overdue threshold time.
Request Date	The day when the customer requested the callback.
Request Time	The time the customer requested the callback.
Upcoming	The time when the customer requested a callback has not yet arrived.

Workgroup Interval Time Report

The Workgroup Interval Time report shows how agents are performing at specific times of the day during a period. Time intervals can be as brief as 1 minute and as long as 60 minutes.

Each row of the report shows a single time interval, based on the interval value that your administrator set. The administrator can include the threshold values to indicate the number of interactions missed or met by interval. Therefore, selecting a start and end time for this report is slightly different from the procedure for other reports. For more information, see "[Report Start and End Times](#)" on page 20-6.

[Table 20–15](#) describes the Workgroup Interval Time report, the corresponding tables, and the formulas used in calculations (where applicable).

Table 20–15 Workgroup Interval Time Report

Columns	Description	Table	Calculation
Interval	The period of the report. The total number of rows in the report is based on your specified Interval Time and the period of the report. For example, the report would contain eight rows if the report was created for the period between 2:00 P.M. and 4:00 P.M. for a single day with interval times of 15 minutes.	The following is a list of the tables that are used in the Workgroup Interval Time report: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsACDIntervalTime ■ Invervaltime 	Not applicable.
Agent Answered	The columns in this area apply to the number of interactions that were answered by agents during each of the time intervals.	Not applicable.	Not applicable.

Table 20–15 (Cont.) Workgroup Interval Time Report

Columns	Description	Table	Calculation
Below Threshold 1	The total number of interactions accepted by agents within the first defined threshold for the interactions in the report.	Corresponding tables include: <ul style="list-style-type: none"> ▪ HistoryActions ▪ Duration ▪ ReportsACDIntervalTime ▪ Callthreshold1 ▪ Callbackthreshold1 ▪ WebCallbackthreshold1 ▪ Chathreshold1 ▪ Emailthreshold1 ▪ Faxthreshold1 	Not applicable.
Below Threshold 2	The total number of interactions accepted by agents within the second defined threshold for the interactions in the report.	Corresponding tables include: <ul style="list-style-type: none"> ▪ HistoryActions ▪ Duration ▪ ReportsACDIntervalTime ▪ Callthreshold2 ▪ Callbackthreshold2 ▪ WebCallbackthreshold2 ▪ Chathreshold2 ▪ Emailthreshold2 ▪ Faxthreshold2 	Not applicable.
Greater than Threshold 2	The total number of interactions accepted by agents outside the second threshold for the interactions in the report.	Corresponding tables include: <ul style="list-style-type: none"> ▪ HistoryActions ▪ Duration ▪ ReportsACDIntervalTime ▪ Callthreshold2 ▪ callbackthreshold2 ▪ WebCallbackthreshold2 ▪ Chathreshold2 ▪ Emailthreshold2 ▪ Faxthreshold2 	Not applicable.
Abandon	The total number of interactions where the client disconnected after entering the queue, but before reaching an agent.	Corresponding tables include: <ul style="list-style-type: none"> ▪ HistoryActions ▪ ReportsACDIntervalTime ▪ Hasdropped 	Not applicable.
Above Threshold 1	The total number of abandoned interactions outside the first threshold for the interactions in the report.	Not applicable.	Not applicable.

Table 20–15 (Cont.) Workgroup Interval Time Report

Columns	Description	Table	Calculation
Total	The total number of abandoned interactions.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsACDIntervalTime ■ HasTotalInteractions 	Not applicable.
Service Performance Level	The percentage of calls answered within the time specified.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsACDIntervalTime ■ HasPercentageServiceLevel 	Total number of interactions answered before threshold 1 divided by (total number of answered interactions plus abandoned interactions after threshold 1). Note: This calculation is not applied to voice mail, email and fax interactions.

Preview Report

This topic describes the preview report. It includes the following information:

- ["Preview Summary Report"](#) on page 20-25

Note: You cannot view these reports if your contact center is not running preview campaigns.

Preview Summary Report

The Preview Summary report provides a breakdown of the project outcomes (for example, busy and no answer) of all preview call attempts, and the follow-up action taken in response to each outcome.

[Table 20–16](#) describes the Preview Summary report and the corresponding tables.

Table 20–16 Preview Summary Report

Column	Description	Table
Project	The name of the preview calling project.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsPreview

Table 20–16 (Cont.) Preview Summary Report

Column	Description	Table
Outcome	The outcome assigned to the interaction by the agent.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsPreview ■ HasOutcomeName
Phone	The telephone number dialed in the preview call attempt.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsPreview ■ HasPhone
Action	The action taken as a result of the call attempt.	Not applicable.
None	No action is required.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsPreview ■ HasAction ■ ActionID
Add to Do Not Call List	Choosing this result removes the number from the preview calling list, so that Oracle Contact On Demand does not provide the number to agents to call again.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsPreview ■ HasAction ■ ActionID
Call Back	<p>Oracle Contact On Demand will call this number back at a specified day and time.</p> <p>Callbacks for preview calls work differently from callbacks for ACD calls.</p> <p>When you schedule an ACD callback (after the customer calls your company and is routed to you), Oracle Contact On Demand automatically calls the customer at the correct time, and then connects the customer to an agent.</p> <p>When you schedule a callback for a preview call, Oracle Contact On Demand tries to call every number in the current Dialer List before it tries the callback number. (A dialer list is the list of preview phone numbers that Oracle Contact On Demand is using.)</p> <p>If there are a lot of numbers in the current dialer list, it is possible that the callback is not dialed at the time that you set in the Outcome window.</p>	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsPreview ■ HasAction ■ ActionID

Table 20–16 (Cont.) Preview Summary Report

Column	Description	Table
Personal Callback	When selected, Oracle Contact On Demand adds a new task to your Task tab. When the time for the callback arrives, Interaction Manager opens a reminder box on your computer with the customer's name and phone number.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsPreview ■ HasAction ■ ActionID

Agent Profile and Productivity Reports

This topic describes the agent profile and productivity reports. It includes the following information:

- ["Login by Groups of Users Report"](#) on page 20-27
- ["Agent Skills Report"](#) on page 20-27
- ["Agent Utilization Report"](#) on page 20-28
- ["Direct Dialing Statistics Report"](#) on page 20-29
- ["Agent Information Report"](#) on page 20-31
- ["Agent Interaction Report"](#) on page 20-31
- ["Login by User Report"](#) on page 20-33

Login by Groups of Users Report

The Login by Groups of Users report shows the total logged-in time for each agent. It is similar to the Login by User report, except that this report shows data for the entire period, and not for each session.

Note: When configuring this report, you can use the Users Supervised By option to exclude supervisors.

[Table 20–17](#) describes the main report elements.

Table 20–17 Login by Groups of Users Report

Column	Description
Agent or Workgroup, Department, or Supervisor to which the agent belongs	This report can include all agents in a department or workgroup, supervised by a supervisor, or only selected agents. The names of the departments, workgroups, supervisors, or agents appear in this column.
Total	The total time (hh:mm:ss) that the agent was logged in to Oracle Contact On Demand.
Username	The agent's login name.

Agent Skills Report

The Agent Skills report shows the agent profiles and their associated skill levels. It shows:

- All the skills defined for your company

- Which agents possess each skill
- Each agent's rating for that skill

Thus, you can quickly see which agents possess which skill in your contact center, and identify the agents whom you want to include in a workgroup requiring specific skills or requirements.

Note: This report is available only to companies for which skills were created.

Table 20–18 describes the main report elements of the Agent Skills report.

Table 20–18 Agent Skills Report

Column	Description
Skill Name (such as Macintosh, PC, UNIX)	The name of the skill required for the agent.
First Name	The agent's first name.
Last Name	The agent's last name.
Rating	The skill-level rate (weighting from 0 to 100) assigned to a skill when creating an agent.

Agent Utilization Report

The Agent Utilization report shows agent activity, including the amount of time each agent spent handling interactions, awaiting interactions, on a break, and the total time logged in.

Table 20–19 describes the main report elements.

Table 20–19 Agent Utilization Report

Column	Description
Agents	The full names of the agents appear below this column (one agent for each row).
Available	How long (hh:mm:ss) the agent's status was Available and the percentage of time that the agent was Available when compared with the agent's total logged-in time. This amount accumulates each time that the agent logs in.
Busy	How long (hh:mm:ss) the agent's status was Busy, and the percentage of time that the agent was Busy when compared with the agent's total logged-in time. This amount accumulates with the addition of each time that the agent logs in.
On Break	How long (hh:mm:ss) the agent's status was On Break, and the percentage of time that the agent was On Break when compared with the agent's total logged-in time. This amount accumulates with the addition of each time that the agent logs in.
Report Date Range to Include	This report includes information from this date (dd/mm/yyyy) and time (hh:mm:ss) to this date (dd/mm/yyyy) and time (hh:mm:ss).

Table 20–19 (Cont.) Agent Utilization Report

Column	Description
Total Time Logged In	How long (hh:mm:ss) the agent was logged in to Oracle Contact On Demand. (The time accumulates with the addition of each time that the agent logs in.)

Direct Dialing Statistics Report

The Direct Dialing Statistics report shows nonworkgroup calls where:

- An agent dialed another agent
- An agent called an external number
- A caller dialed an agent directly

This report shows the activity for the entire company, and includes all agents in a selected project or workgroup, and not only the agents whom you supervise.

The report includes three areas:

- **Agent Segment Processing.** The average time that agents spent in various phases of each interaction. For more information, see "[Agent Segment Processing Area](#)" on page 20-29.
- **Summary.** The overall data for the interactions received and overview data for the interaction waiting times. For more information, see "[Summary Area](#)" on page 20-30.
- **Media Type Segments Received.** The number of interactions of each media type handled by the selected projects. For more information, see "[Media Type Segments Received Area](#)" on page 20-29.

Agent Segment Processing Area

The *Agent Segment Processing* area of the direct dialing statistics report shows the average time that agents spent in various phases of an interaction.

[Table 20–20](#) describes the Agent Segment Processing area of the Direct Dialing Statistics report.

Table 20–20 Direct Dialing Statistics Report: Agent Segment Processing Area

Column	Description	Calculation
Average Talk Time (ATT)	The average time (in seconds) that agents spent talking with callers, including hold time (for the requested period).	Not applicable.
Average Hold Time (ATH)	The average time (in seconds) that agents kept callers on hold (for the requested period).	Not applicable.
Average Handle Time per Segment	The average time (in seconds) agents spent processing a call (including talk time, hold time, and wrap-up time) for the segment of the call for the reporting project (for the requested period).	(Talk time plus wrap-up time) divided by (total interactions).

Media Type Segments Received Area

The *Media Type Segments Received* area of the Direct Dialing Statistics report shows the number of interactions of each media type handled by the selected projects or workgroups.

[Table 20–21](#) describes the Media Type Segments Received area of the Direct Dialing Statistics report.

Table 20–21 Direct Dialing Statistics Report: Media Type Segments Received Area

Item	Description	Table
Direct Inbound	The number of calls made by callers directly to a specific agent plus calls abandoned in the IVR before becoming an ACD call (even if the call was not directed to an agent). A caller using the company directory to reach a specific agent is also counted as a direct inbound call.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportCallCenterKeyNoACD ■ HasInbound
Direct Outbound	The number of calls made by agents directly to an external phone number.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportCallCenterKeyNoACD ■ HasOutbound
Inbound Extension	The number of calls received by agents from other agents.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportCallCenterKeyNoACD ■ HasInExt
Outbound Extension	The number of calls made by a specific agent to other agents.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportCallCenterKeyNoACD ■ HasOutExt
Total Segments Received	The total number of direct dialed calls made or handled by agents (for the requested period).	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportCallCenterKeyNoACD

Summary Area

The *Summary* area of the Direct Dialing Statistics report shows the overview data for the interactions received and interaction waiting times.

[Table 20–22](#) describes the Summary area of the Direct Dialing Statistics report.

Table 20–22 Direct Dialing Statistics Report: Summary Area

Column	Descriptions	Table	Calculation
Total Segments Received	The total number of interactions received by the specified project.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportCallCenterKeyNoACD 	Not applicable.
Number of Times Segments Went to Hold	The total number of times that non-workgroup voice interactions are placed on hold at any time by an agent.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportCallCenterKeyNoACD 	Not applicable.

Table 20–22 (Cont.) Direct Dialing Statistics Report: Summary Area

Column	Descriptions	Table	Calculation
Duration of Interactions	The total time that interactions spent in Oracle Contact On Demand.	Corresponding tables include: <ul style="list-style-type: none"> ▪ HistoryActions ▪ ReportCallCenterKeyNoACD 	The difference between the time that Oracle Contact On Demand received the interaction and the end of the interaction.

Agent Information Report

The Agent Information report shows profile information for each agent defined for the company, in the workgroups and departments that you select.

[Table 20–23](#) describes the Agent Information report and its corresponding tables.

Table 20–23 Agent Information Report

Column	Description
Accounting Standing	Identifies whether the agent is active or inactive.
Active Address	The number that the agent configured for inbound call-routing.
Email	The agent's email address.
Extension	The agent's telephone extension number.
First Name	The agent's first name.
Last Name	The agent's last name.
Phone	The agent's telephone number.
Skills	The skills assigned to the agent.
Username	The agent's login name.
Workgroups	The workgroups to which the agent belongs.

Agent Interaction Report

The Agent Interaction report shows the distribution of calls and other interaction types for agents grouped by projects, workgroups, or departments. It shows the number of interactions that the agent handled.

[Table 20–24](#) describes the main Agent Interaction report elements, and their corresponding tables.

Table 20–24 Agent Interaction Report

Column	Description	Table
Agents	The agent's full name. This column shows the list of agents (one agent user name for each row).	Not applicable.
Callback	The number of callback interactions that the agent accepted.	Corresponding tables include: <ul style="list-style-type: none"> ▪ HistoryActions ▪ ReportsAgentInteractions ▪ HasACDCallback

Table 20–24 (Cont.) Agent Interaction Report

Column	Description	Table
Chat	The number of chat interactions that the agent accepted.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsAgentInteractions ■ HasChat
In Ext	The number of telephone calls that the agent received from other Oracle Contact On Demand agents.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsAgentInteractions ■ HasInExt
Inbound	The number of inbound calls made directly to and accepted by the agent.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsAgentInteractions ■ HasInbound
Out Ext	The number of telephone calls that this agent made to other Oracle Contact On Demand agents.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsAgentInteractions ■ HasOutExt
Outbound	The number of outbound calls that this agent made to customers.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsAgentInteractions ■ HasOutbound
Preview	The number of preview call interactions made by the agent.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsAgentInteractions ■ HasPreview
Total	The total number of interactions handled by the agent.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsAgentInteractions
Voicemail	The number of voice mail interactions that the agent accepted.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsAgentInteractions ■ HasVoicemail
Web Callback	The number of Web callback interactions that the agent accepted.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsAgentInteractions ■ HasWebCallback
Workgroup Calls	The number of workgroup calls that the agent accepted.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsAgentInteractions ■ HasACDCalls

Table 20–24 (Cont.) Agent Interaction Report

Column	Description	Table
Workgroup Email	The number of workgroup email interactions that the agent accepted.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsAgentInteractions ■ HasEmail
Workgroup Fax	The number of workgroup fax interactions that the agent accepted.	Corresponding tables include: <ul style="list-style-type: none"> ■ HistoryActions ■ ReportsAgentInteractions ■ HasFax

Login by User Report

The Login by User report shows the total time that agents and supervisors were logged in to Oracle Contact On Demand for each session.

The difference between this report and the Login by Groups of Users report is that the Login by User report shows data for each session. The Login by Groups of Users report shows data for the entire period.

[Table 20–25](#) describes the Login by User report elements.

Table 20–25 Login by User Report

Column	Definition
Username	The agent's login name.
Duration	How long the agent was logged in to Oracle Contact On Demand for each session.
Login Date	The day (mm/dd/yyyy) when the agent logged in to Oracle Contact On Demand. Note: The Date format can vary. It depends on the default settings for the report, or users selections when they view the report.
Login Time	The time (hh:mm:ss A.M. or P.M.) when the agent logged in to Oracle Contact On Demand.
Total Time Logged In	How long the agent was logged in to Oracle Contact On Demand, which is a cumulative value of multiple login times for the same log-in date.

Project Segments Report

The Project Segments report shows a set of interaction statistics, by interaction type (phone, email, and so on) and a summary for all interaction types.

Note: This report was formerly known as the Project Key Statistics report.

[Table 20–26](#) describes the report elements, their corresponding tables, and the formulas used in calculations (where applicable).

Table 20–26 Project Segments Report

Column	Description	Table	Calculation
Segment Events			
Total Segments Received	The total number of interactions that occurred for the specified period and project.	HistoryActions	Not applicable.
Total Talk Time	The total time agents spent talking with customers (for the specified period).	HistoryActions	(Talk Time).
Average Talk Time (ATT)	The average time that agents spent talking with customers.	HistoryActions	(Total Talk Time) divided by (total number of answered segments).
Total Hold Time	The total time customers spent on hold.	HistoryActions	Not applicable.
Average Hold Time (AHT)	The average time that customers spent on hold.	HistoryActions	(Total hold time) divided by (total number of hold segments).
Total Wait To Answer Time	The total time that all customers spent in a queue (including the ring time) for the specified period.	HistoryActions	Not applicable.
Average Speed of Answer (ASA)	The average time that customers spent waiting in a queue for an agent, including ring time.	HistoryActions	(Total Time in Queue) divided by (total number of answered segments).
Longest Wait to Answer Time	The longest time spent by any customer waiting in a queue for an agent, including the ring time.	HistoryActions	Not applicable.
Shortest Wait to Answer Time	The shortest time spent by any customer waiting in a queue for an agent, including the ring time.	HistoryActions	Not applicable.
Total Wrap-up Time	The total time that all agents spent in the wrap-up state while wrapping up concluded interactions.	HistoryActions	Not applicable.
Average Wrap Up Time (AWT)	The average time that agents spent wrapping up a concluded interaction.	HistoryActions	(Total Wrap-up Time) divided by (total number of answered segments that went to wrap-up).
Total Enter IVR	The total interactions that entered IVR.	HistoryActions	Not applicable.
Total IVR Time	The total time that all customers spent in IVR, for the specified time.	HistoryActions	Not applicable.
Average Time in IVR	The average time that all customers spent in IVR, for the specified time.	HistoryActions	Not applicable.
Interaction Type Summary			

Table 20–26 (Cont.) Project Segments Report

Column	Description	Table	Calculation
Inbound Calls	The total number of inbound call interactions. Note: If a Direct Inward Dialing number (DID) was set for an agent, then direct inbound calls are not included in reports.	HistoryActions	Not applicable.
Outbound Calls	The total number of calls made by agents directly to outside numbers.	HistoryActions	Not applicable.
Chat	The total number of chat interactions.	HistoryActions	Not applicable.
Workgroup Email	The total number of workgroup emails that were made during the specified period.	HistoryActions	Not applicable.
Web Callback	The total number of Web callbacks that were made during the specified period.	HistoryActions	Not applicable.
Preview	The total number of preview calls made during the specified period.	HistoryActions	Not applicable.
Total	The total number of all interaction types recorded during this reported period.	HistoryActions	Not applicable.

Network Traffic Report

This topic describes the Network Traffic report. It includes the following information:

- ["Call Details Report"](#) on page 20-35

Call Details Report

The Call Details report provides detailed information about all calls coming in to Oracle Contact On Demand. This report includes information about the call start time, drop time, time spent in IVR, time in queue, first and last agent, hold count, hold time, transfer count, and so on. This information is helpful in tracking and researching call and telephone company (Telco) billing issues.

Note: This report is available only from Administration Manager and only to network administrators.

[Table 20–27](#) describes the main Call Details report elements.

Note: You might not see all of the information listed in this table, because the creator of this report (your administrator) can select some or all of the columns (or items).

Table 20–27 Call Detail Report

Column	Description
ID	The unique call transaction identification number.
Start Time	The date (mm/dd/yyyy) and time (hh:mm:ss A.M. or P.M.) when the call entered the interactive voice response (IVR) system. Note: The date format can vary. It depends on the default settings for the report, or users selections when they view the report.
Duration	How long the call lasted from the time it entered the IVR to when it was dropped. The format is hh:mm:ss.
Ending Reason	The reason why the call ended (such as disconnected from the network, ended by Oracle Contact On Demand).
ANI	The telephone number of the originating call, retrieved by the automatic number identification (ANI) service. For example, if a customer calls Oracle Contact On Demand, the customer's telephone number appears. If an agent calls Oracle Contact On Demand, the agent's extension number appears.
DNIS	The telephone number dialed by the caller, retrieved by the dialed number identification service (DNIS).
Call Type	The type of call (such as inbound, outbound, remote agent leg).
Project Name	The name of the project associated with the DNIS, if known.
Resource Name	The telephony services resource name, such as Session Initiated Protocol (SIP).
Dialed Number	The area code and telephone number dialed by the agent (outbound call).

Tenant Summary View

This topic describes the Tenant Summary view and how to create it.

Note: This view is available only with the NetAdmin login.

It includes the following topics:

- ["About the Tenant Summary View"](#) on page 20-36
- ["Viewing a Tenant Summary View"](#) on page 20-38
- ["Creating a Tenant Summary View"](#) on page 20-38
- ["Editing a Tenant Summary View"](#) on page 20-39

About the Tenant Summary View

The Tenant Summary View provides a summary of real-time statistics for each tenant. Real-time statistics include:

- Number of logged in users
- Number of available agents
- Number of interactions
- Number of each interaction type in report period

Note: This report is available only for NetAdmin users and cannot be scheduled.

- Web service statistics

Tenant statistics are updated at periodic intervals according to a refresh timer, which is set by the administrator. Using NetAdmin, the statistics can also be refreshed manually with the Refresh Now button on the report.

Table 20–28 describes the elements of the Tenant Summary View, which allows NetAdmin to monitor real-time tenant statistics.

Table 20–28 *Tenant Summary View*

Item	Descriptions
Company	The name of the tenant's company.
Users Logged In	Current number of total users logged in.
Agents Available	Current number of Agent user types that are in the Available state for the company.
Interaction Count	The number of active interactions for the company. This includes interactions in queue, being handled by agents or by the IVR.
Active Interactions	<p>Statistics for active interactions for the company are listed by:</p> <ul style="list-style-type: none"> ■ Inbound Calls - Number of calls in the queue for all projects, and currently in progress with IVR or being handled by agents. ■ Chats - Number of ACD chats in the queue for all projects, and in progress with agents handling. ■ ACD Callbacks - Number of ACD callbacks in queue for all projects and currently in progress with agents handling. This does not include rescheduled Voice Callbacks that are not due. ■ Web Callbacks - Number of Web callbacks in the queue for all projects, and currently in progress with agents handling. This does not include rescheduled callbacks that are not due. ■ Outbound Calls - Number of outbound calls in the queue for outgoing resources, and currently in progress with agents handling. ■ Emails - Number of ACD emails in the queue for all projects, and those currently being handled by agents. ■ Faxes - Number of faxes in the queue for all projects, and those currently being handled by agents. ■ Voice mails - Number of voice mails in the queue for all projects, and those currently being handled by agents. ■ Abandoned Last 15 Seconds - Number of Abandoned ACD Calls within the last 15 seconds. After the initial display, the number appears as "-" until the first update is received. <p>. This includes interactions in queue, being handled by agents or by the IVR.</p>
Web Services	<p>The number of Web service sessions for the company are reported as:</p> <ul style="list-style-type: none"> ■ Licensed Sessions - Number of licensed sessions for the Web service. ■ Active Sessions - Number of active sessions for the Web service. ■ Exceeded Sessions - Number of exceeded sessions for the Web service.

Table 20–28 (Cont.) Tenant Summary View

Item	Descriptions
Total	Total of calculations for each column.
Refresh Now	Button used to refresh the statistics regardless of the timer setting.
Auto Refresh	Check to refresh the statistic within the timer setting.
Reset Timer	This button appears if the Auto Refresh option is checked. Click this button to reset the refresh timer while it is counting down.
Last Refresh Timer	Last time the statistic was refreshed.

Note: The date and time of the last update to the view is displayed at the bottom of view.

Viewing a Tenant Summary View

This topic describes how to view an existing Tenant Summary View.

To view a Tenant Summary view

- From the NetAdmin menu, click Reports, and then click Tenant Summary View.
The Real Time Tenant Summary Report View appears, displaying a list of all existing real-time tenant summary reports.
- From the list of existing reports, click the report that you want to view, and click View.
A Report window opens.
- On the Period Covered tab, select the start and end dates, and the start and end times for the report.
- On the Regional Options tab, verify that the correct display time, language, and date format are selected, and then click OK.

Creating a Tenant Summary View

This topic describes how to create a Tenant Summary View.

To create a Tenant Summary view

- From the NetAdmin menu, click Reports, then click Tenant Summary View, then click Add.
- In the Name tab, type a name for the report and (optionally) provide a description of the report.
- On the Content tab, select one of the following:
 - Choose All to report on all tenants
 - Choose Specific to report on individual tenants. Move the tenant from the Available Tenants box to the Selected Tenants box.
 - Select one of the following refresh modes:
 - AJAX.
 - IFrame.
- On the Layout tab, set the column display order for the report.

5. Click the Regional Options tab to select a time zone, language, and date format for the report, and then click OK.

Editing a Tenant Summary View

This topic describes how to edit an existing Tenant Summary View.

To edit a Tenant Summary view

1. From the NetAdmin menu, click Reports, click Tenant Summary View, and then click Edit.
2. In the Name tab, edit the report name, and edit the description of the report (optionally).
3. On the Content tab, select one of the following:
 - Choose All to report on all tenants
 - Choose Specific to report on individual tenants. Move the tenant from the Available Tenants box to the Selected Tenants box.
 - Select one of the following refresh modes:
 - AJAX.
 - IFrame.
4. On the Layout tab, edit the column display order for the report.
5. Click the Regional Options tab to select a time zone, language, and date format for the report, and then click OK.

Working with Advanced Reports

This chapter of Oracle Contact On Demand describes the advanced reports that you can create in either the tabular and graphical format. It includes the following topics:

- [Advanced Reports](#)
- [Viewing Advanced Reports](#)
- [Adding or Editing Advanced Reports](#)
- [Deleting an Advanced Report](#)
- [Identifying Advanced Report Contents](#)
- [Setting the Display Time, Language, and Format](#)
- [Selecting an Output Format for Advanced Reports](#)
- [Scheduling an Advanced Report](#)
- [Identifying Who Can Access Advanced Reports](#)
- [Printing Advanced Reports](#)
- [Configuring the Report.xml File](#)
- [Daily Project Performance Report](#)
- [Interval Workgroup Performance Report](#)
- [User Login/Logout Report](#)
- [User Hourly Average Report](#)
- [Daily User Performance Report](#)
- [Peak Interactions Report](#)
- [System Peak Interactions Report](#)
- [Interaction Outcome by Workgroup Report](#)
- [Service Billing Report by Project](#)
- [User Status Duration Report](#)
- [Inbound Traffic Report by Project](#)
- [Admin Audit Report](#)
- [Security Audit Report](#)
- [Platform Use Report](#)
- [Tenant Use Report](#)

- [Real Time Tenant Summary Report](#)
- [Configuration Baseline Report](#)

Advanced Reports

You can create and view advanced reports to help you understand the key performance indicators to help you more efficiently manage your contact center.

List of Advanced Reports

[Table 21-1](#) provides the names and descriptions for each of the advanced reports available from Administration Manager view to help you understand the trends, activities, and agent performance.

[Table 21-1](#) describes the Advanced Reports in Oracle Contact On Demand.

Table 21-1 List of Advanced Reports

Report	Description
Daily Project Performance Report	<p>This report provides contact center activity by call number and call type, time measurements of contact center activity, talk time, and the service-level performance compared to the preset thresholds.</p> <p>Use this report to determine the volume and service factors by project to identify the busy hour and staffing requirements, based on the call volume.</p> <p>You can configure this report to show all activity for all projects, or for the individual projects that you select by interval, or by dates.</p>
Interval Workgroup Performance Report	<p>This report shows the workgroup call activity, total workgroup ACD status time, and the total number of agents logged in. The administrator sets the interval. The statistics tracked include:</p> <ul style="list-style-type: none"> ■ Number, type and disposition of calls ■ Service levels ■ Collective time in ACD states ■ Agent login activity and visibility into ACD states <p>Use this report to identify the volume, call routing, and service factors measured by the workgroup service level, as well as a user-defined service level.</p>
User Login/Logout Report	<p>This report shows agent login and logout activity by date, time, event, and reason.</p> <p>Use this report to determine how a specific user is spending time compared with other users.</p>
User Hourly Average Report	<p>This report highlights individual agent performance by time in ACD status, call counts, call types, and talk time. It provides information on hourly agent activity, including calls handled, along with time spent in different ACD states.</p> <p>Use this report to determine agent average performance compared to reasonable expectations.</p>
Daily User Performance Report	<p>This report provides information on daily agent activity, including time spent in different ACD states, call counts, and talk time. Use this report to monitor agent performance compared to reasonable expectations.</p>

Table 21–1 (Cont.) List of Advanced Reports

Report	Description
Peak Interactions Report	This report tracks the maximum number of interactions in 15-minute intervals. (This information is stored in the Interactions Peak table in the Oracle Contact On Demand database.) Use this report to determine the peak-interaction activity for all projects or for individual projects.
Interaction Outcome by Workgroup Report	This report tracks interactions by outcome, number of interactions for each outcome duration, and the average duration.
Service Billing Report - by Project	The report shows the transaction times and billing rates by project, for a specified period. Use this report to determine the transaction and billing activity for all projects or for individual projects.
User Status Duration Report	This report tracks agent activity through the use of user-defined agent statuses. It provides more information about the way agents spend their time compared with the standard ACD statuses of Available, Busy, and On Break. This report tracks: <ul style="list-style-type: none"> ■ User ■ Date ■ Status (company defined) ■ Duration ■ ACD status (system default) ■ Percentage of total Use this report to determine how a specific user spends time compared with other users.
Inbound Traffic Report	This report provides a count of the number of calls offered by area code and exchange within that area code. Use this report to determine the exchange with the largest volume of calls within each area code.
Admin Audit Report	This report complies with the company privacy requirements, and shows the changes for historical data made to Oracle Contact On Demand in Administration Manager. The report includes the changes affecting all company pages, agent configurations and active status, workgroup configurations, and project changes. It also identifies the user who made the change.
Security Audit Report	This report shows all security violations (Event or Errors), login attempts and system actions, in compliance with the company privacy requirements.
Configuration Baseline	This report provides online documentation of all initial configuration attributes by company, as well as subsequent changes to the specified configuration.
NetAdmin Menu Advanced Reports	
System Peak Interactions Report	This report tracks the number of peak interactions used by Oracle Contact On Demand, reported in preset intervals by company. Use this report to determine when additional requirements might be required to handle high-volume interactions.
Platform Use Report	This report provides an overview of the network traffic (consumption of resources by media type) for a specified period.

Table 21–1 (Cont.) List of Advanced Reports

Report	Description
Tenant Use Report	This report provides the configuration statistics for each company and the respective totals within Oracle Contact On Demand. It includes statistics on the features activated, user definitions and permissions, and projects and workgroups defined for each company.

Note: Supervisors cannot create or edit report definitions. If you are a supervisor and want a new report, or want to change an existing report, contact your administrator.

Viewing Advanced Reports

This topic describes how to view existing advanced reports.

To view advanced reports

1. Click Advanced Reports, and then Advanced Reports.
A list of advanced report types opens.
2. Click the Advanced Report type containing the report that you want to view.
A list of existing reports opens.
3. Do one of the following:
 - Right-click a report from the report list, and select View from the shortcut menu.
 - Left-click a report from the list, and select View at the top of the screen.
The Report window opens.

Defining the Period in an Advanced Report

This topic describes how to define the period to include in an advanced report.

To define the period to include in an advanced report

- In the Period Covered tab, set the date and time.

[Table 21–2](#) describes the fields and controls in an advanced report.

Table 21–2 Time Range in an Advanced Report

Field	Description
Start Date	<p>Click the calendar icon to open a calendar from which you can choose the start date of the report period:</p> <ul style="list-style-type: none"> ■ Click the right-angle bracket or the left-angle bracket to advance or move back the calendar one month. ■ Click the right, double-angle brackets (>>) or the left, double-angle brackets (<<) to advance or move back the calendar one year. <p>Choose the report start date by clicking a day in the calendar, or click today to choose today's date (based on your workstation's system clock).</p>

Table 21-2 (Cont.) Time Range in an Advanced Report

Field	Description
End Date	<p>Click the calendar icon to open a calendar from which you can choose the end date of the report period:</p> <ul style="list-style-type: none"> ▪ Click the right-angle bracket or the left-angle bracket to advance or move back the calendar one month. ▪ Click the right, double-angle brackets (>>) or the left, double-angle brackets (<<) to advance or move back the calendar one year. <p>Choose the report end date by clicking a day in the calendar. Or, click today to choose today's date (based on your workstation's system clock).</p>

Defining the Display Time, Language, and Date Format for an Advanced Report

You can define the display time, language, and date format for an advanced report.

To define the display time, language, and date format for an advanced report

1. Click the Regional Options tab.
2. Complete the Regional Options fields.

The following table describes the display time, language, and date format for advanced reports.

Field	Description
Display Time	<p>Do one of the following:</p> <ul style="list-style-type: none"> ▪ Choose Company Default Time Zone to display all report times in the time zone defined as the default for your company. ▪ Choose User Time Zone to display all report times in the time zone that has been configured in Oracle Contact On Demand.
Report Language	From the list, select the language in which you want the report to appear.
Select Date Format to Display in Report	<p>Do one of the following:</p> <ul style="list-style-type: none"> ▪ Choose Company Default Date Format to display all report dates in the format defined as the default for your company. ▪ Choose User Defined Date Format to display all report dates in the format configured in Oracle Contact On Demand.

3. Click OK.

The report appears in a browser window.

Adding or Editing Advanced Reports

This topic describes how to add new advanced reports or edit existing advanced reports.

Adding a New Advanced Report

This task describes how to add a new advanced report.

To add a new advanced report

1. Click Advanced Reports, and then Advanced Reports.

A list of report types opens.

2. Click the report type under which you want to add a report and click Add.
The Report Creation screen opens.
3. In the Name tab, type a name for the report, and (optionally) a description of the report.
4. In the Content tab (if enabled), select the options for the content that you want to include in the report.
5. Complete the Regional Options tab fields.
The following table describes the fields in the Regional Options tab.

Field	Description
Display Time	Do one of the following: <ul style="list-style-type: none"> ▪ Choose Company Default Time Zone to display all report times in the time zone defined as the default for your company. ▪ Choose User Time Zone to display all report times in the time zone configured for your Oracle Contact On Demand workstation.
Report Language	From the list, choose the language that you want to use in the report.
Select Date Format	Do one of the following: <ul style="list-style-type: none"> ▪ Choose Company Default Date Format to display all report dates in your company's default format. ▪ Select the report date format from the list.

6. In the Output Format tab (if enabled), select one of the following output formats:
 - HTML
 - PDF
 - XLS
 - CSV
7. In the Permissions tab (if enabled), select who can view the new report.
8. In the Schedule Report tab, do the following:
 - a. Click the Enable Report Scheduling option.
 - b. Select Daily, Weekly, or Monthly, and add email addresses to the To and From fields.
 - c. Select the SMTP group that you want to send the report to.
These groups are configured as part of Oracle Contact On Demand setup for libraries. For more information, see ["Adding or Editing an SMTP Groups Library"](#) on page 6-49.

Note: You can enter a maximum of 2048 characters in the To field, and a maximum of 128 characters in the From field.

9. Click OK.

Editing an Existing Advanced Report

Only administrators can edit a report.

To edit an advanced report

1. Click Advanced Reports, and then Advanced Reports.
2. Click the report type containing the report that you want to edit.
3. Click the report that you want to edit, and click Edit.
4. In the Name tab, edit the report name, and (optionally) the description of the report.
5. In the Content tab (if enabled), select the options for the content that you want to include in the report.
6. Complete the Regional Options tab fields.

The following table describes the selections and fields in the Regional Options tab.

Field	Description
Display Time	Do one of the following: <ul style="list-style-type: none"> ▪ Choose Company Default Time Zone to display all report times in the time zone defined as the default for your company. ▪ Choose User Time Zone to display all report times in the time zone configured for your Oracle Contact On Demand workstation.
Report Language	From the list, choose the language that you want to use in the report.
Select Date Format	Do one of the following: <ul style="list-style-type: none"> ▪ Choose Company Default Date Format to display all report dates in your company's default format. ▪ Select the report date format from the list.

7. In the Output Format tab (if enabled), select one of the following output formats:
 - HTML
 - PDF
 - XLS
 - CSV
8. In the Permissions tab (if enabled), select who can view the report:
 - a. In the Schedule Report tab, click the Enable Report Scheduling option.
 - b. Select Daily, Weekly, or Monthly, and then add email addresses to the To and From fields,
 - c. Select the SMTP group that you want to send the report to.

These groups are configured as part of Oracle Contact On Demand setup for libraries. For more information, see "[Adding or Editing an SMTP Groups Library](#)" on page 6-49.

Note: You can enter a maximum of 2048 characters in the To field, and a maximum of 128 characters in the From field.

9. Click OK.

Deleting an Advanced Report

Administration Manager allows you to create and delete many objects, such as workgroups, data sources, companies, projects, agents, and so on. Deleting unused objects creates space in the Oracle Contact On Demand database, however, the deleted objects remain in the database so that historical data can be captured in reports. For example, if you delete a project on 11 November, and then run a report that shows project activity dating back to 1 November, the report will show the activity from the deleted project.

This topic describes how to delete an advanced report.

To delete an advanced report

1. In the Navigation Pane, navigate to Custom Reports, and then Advanced Reports.
A list of available reports appears.
2. Click a report name, for example, Daily Project Performance, to access a list of reports of that type.
3. Right-click the report that you want to delete.
4. Select Delete from the menu, and then click OK to confirm the deletion.

Note: You can also select a report, and then click Delete.

Identifying Advanced Report Contents

All reports, except peak interactions reports and system interactions reports, have a Contents tab. For more information, see "[Viewing Advanced Reports](#)" on page 21-4.

To identify advanced reports content

- Click the Content tab.

The items that display in the Content tab vary and depend on the report that you selected.

Setting the Display Time, Language, and Format

This topic describes how to set the Advanced Report display time, the language, and the format.

To set advanced report display time, the language, and format

1. Click the Regional Options tab.
2. Complete the fields to select a time zone, report language, and report format.

Note: This screen is identical for all reports.

The following table describes the fields in the Regional Options tab.

Field	Description
Display Time	Do one of the following: <ul style="list-style-type: none"> ■ Choose Company Default Time Zone to display all report times in the time zone defined as the default for your company. ■ Choose User Time Zone to display all report times in the time zone configured for your Oracle Contact On Demand workstation.
Report Language	From the list, select the language in which you want the report to appear.
Select Date Format to Display in Report	Do one of the following: <ul style="list-style-type: none"> ■ Choose Company Default Date Format to display all report dates in the format defined as the default for your company. ■ Choose User Defined Date Format to display all report dates in the format configured for your Oracle Contact On Demand workstation.

Selecting an Output Format for Advanced Reports

For the majority of advanced reports there are a number of output options.

You can choose the following formats for reports:

- HTML (.html)
- Adobe PDF (.PDF)
- Microsoft Excel (.XLS)
- Comma-Separated Values (.CSV)

Note: The online Configuration Baseline report does not have an Output tab.

To select options for HTML, PDF, XLS or CSV output

1. Click the Output Format tab.
2. Choose the output format for the report, and then click OK.

Scheduling an Advanced Report

Before using the scheduling feature the first time, you must make some minor edits to the report.xml file. For more information, see "[Configuring the Report.xml File](#)" on page 21-11.

Note: The online Configuration Baseline report does not have the Schedule option.

To schedule an advanced report

1. Click the Schedule Report tab.

This tab allows you to:

- Schedule reports to run automatically.
- Schedule reports during selected periods.

- Schedule reports to be sent automatically to one or more email addresses.

Note: Oracle Contact On Demand generates all scheduled reports at midnight, according to company schedule.

2. Select the Enable Report Scheduling option.
3. Select one reporting period from the following list:
 - **Daily.** Provides statistics for a 24-hour period between midnight and midnight daily.
 - **Weekly.** Shows information from Sunday at 12:00 A.M. to the following Saturday at 11:59 P.M.
 - **Monthly.** Provides information for a complete month.
4. In the fields, do the following:
 - a. In the To field, separate multiple email addresses with a semi-colon (;).
For example:
`brice@indy500.com;gdefarran@indy500.com`

You can enter a maximum of 2048 characters in the To field.
 - b. In the From field, enter one or more email addresses where you want Oracle Contact On Demand to send the report.

The person who receives the report will see this address in the From field in the email. You can enter a maximum of 128 characters in the From field.
 - c. From the Select an SMTP Group list, select a group.

These groups are configured as part of Oracle Contact On Demand setup for libraries. For more information, see "[Adding or Editing an SMTP Groups Library](#)" on page 6-49.

Identifying Who Can Access Advanced Reports

In most cases, you can decide which individual supervisor can access a report. However, because some reports are not available to supervisors, a Permissions tab is not available. These reports include the following:

- Billing Report
- System Peak Interactions Report
- Service Billing Report
- Inbound Traffic Report by Project
- Call Details Report
- Admin Audit Report
- Security Audit Report
- Platform Use Report
- Configuration Baseline Report

To identify who can access advanced reports

1. Click the Permissions tab to identify who can access this report.

Note: All Permissions screens work the same way. However, the content varies, because it depends on who can access Oracle Contact On Demand.

2. Do one of the following:
 - Click the Any Supervisor option.
This option allows any supervisor logged in to Oracle Contact On Demand to run and view this report.
 - Click the following Supervisors option.
This option grants permission only to the supervisors whom you select in the Select list.
3. Click OK.
The report appears in a browser window.

Printing Advanced Reports

This topic describes how to print advanced reports. For more information on printing reports, see "[Viewing Advanced Reports](#)" on page 21-4.

To print advanced reports

1. Open the Advanced Report that you want to print.
2. Do one of the following:
 - Click Print in your browser window.
 - Click Print in Acrobat Reader.

Configuring the Report.xml File

The first time you use the report scheduling feature, you must make some minor edits to the report.xml file.

To configure the report.xml file

1. After installing the most current Oracle Contact On Demand build, find the report.xml file at the following location:
TAW/custom/report.xml
2. Open the report.xml file using a text editing program, such as Notepad.
3. Verify that the following tags have the correct values.

Note: The following examples show the default directory paths, but you must verify that these examples are correct for your Web site.

- The URL parameter must contain the URL path of your Oracle Contact On Demand Web Server:

```
<parameter
name="url"
```

```
value="http://<computer name>/TAW"
/>
```

- The `urlReportCss` parameter must contain the URL path to the `web_clients.css` file:

```
<parameter
name="urlReportCss"
value="http://<computer_name>/TAW/css/web_clients.css"
/>
```

- The `urlReport` parameter must contain the URL path to the report directory:

```
<parameter
name="urlReport" value="http://<computer_
name>/TAW/AdministrationManager/report"
/>
```

4. Save any changes.
5. Restart the Oracle Contact On Demand Web Server.

Daily Project Performance Report

The Daily Project Performance report shows contact center activity by call number and type, time measurements of contact center activity, and service-level performance against the preset thresholds.

Note: You can also configure this report to show all activity by all projects or for selected individual projects.

If the project name is too long for the space provided within the report, only part of the name appears. If all the project names cannot be displayed at the top of the report, the additional project names appear at the bottom of the report.

Parts of the Project Performance Report

The report includes the following areas:

- ["Call Measures Area"](#) on page 21-12
- ["Time Measures Area"](#) on page 21-13
- ["Average Speed to Answer Area"](#) on page 21-14

Call Measures Area

The *Call Measures* area tracks call type, calls offered, calls answered, and the percentage of calls answered before and after the specified threshold.

[Table 21–3](#) describes the elements in the Call Measure area of the Daily Project Performance report, the corresponding tables, and the formula used in the calculation (where applicable).

Table 21–3 *Daily Project Performance Report: Call Measures Area*

Item	Description	Table	Calculation
Total In	Represents the total of incoming calls.	<ul style="list-style-type: none"> ■ Project Stats ■ TotalInCalls 	Calculate the sum of (TotInCalls).

Table 21–3 (Cont.) Daily Project Performance Report: Call Measures Area

Item	Description	Table	Calculation
Total Out	Represents the total of outgoing calls.	<ul style="list-style-type: none"> ■ ProjectStats ■ TotalOutCalls 	Calculate the sum of (TotOutCalls).
Internal In	Represents the total of internal extension calls.	<ul style="list-style-type: none"> ■ ProjectStats ■ TotInternalInCalls 	Calculate the sum of (TotInternalInCalls).
Internal Out	Represents the total of outgoing extension calls.	<ul style="list-style-type: none"> ■ ProjectStats ■ TotalInternalOut 	Calculate the sum of (TotInternalOutCalls).
Ans ACD	Represents the total of ACD calls answered.	<ul style="list-style-type: none"> ■ ProjectStats ■ TotalABUACDCalls 	Calculate the sum of (TotABUACDCalls).
Off ACD	Represents the total of ACD calls offered by the project to the workgroup.	<ul style="list-style-type: none"> ■ ProjectStats ■ TotACDCalls 	Calculate the sum of (TotACDCalls).
Abdn ACD	Represents the total of ACD calls abandoned.	<ul style="list-style-type: none"> ■ ProjectStats ■ TotAbanACDCalls 	Calculate the sum of (TotAbanACDCalls).
Ref ACD	Represents the total of ACD calls refused.	<ul style="list-style-type: none"> ■ ProjectStats ■ TotRefusedACDCalls 	Calculate the sum of (TotRefusedACDCalls).
Total <date>	For each day of a project, this number is the total amount for each item in the call measures category.	<ul style="list-style-type: none"> ■ ProjectStats 	Not applicable.
Total <Project Name>	For each project, this number is the total amount for each item in the call measures category, for all days.	<ul style="list-style-type: none"> ■ ProjectStats 	Not applicable.
Grand Total	The total for each item in Call Measures category, for all projects.	<ul style="list-style-type: none"> ■ ProjectStats 	Not applicable.

Time Measures Area

The *Time Measures (Avg)* area shows the average time for the key statistical areas.

Table 21–4 describes the elements of the Time Measures area of the Daily Project Performance report, the corresponding tables, and the formula used in the calculation (where applicable).

Table 21–4 Daily Project Performance Report: Time Measures (AVG) Area

Item	Description	Table	Calculation
Talktime ACD Duration	Represents the average talk time for all ACD calls in the project.	<ul style="list-style-type: none"> ■ ProjectStats ■ TimeTalkACDCalls 	Calculate the sum of (TimeTalkACDCalls) divided by the sum of (TotACDCalls).
Talktime Out Duration	Represents the average talk time for all outbound calls.	<ul style="list-style-type: none"> ■ ProjectStats ■ TotTimeOutCalls 	Calculate the sum of (TotTimeOutCalls) divided by the sum of (TotOutCalls).
ABDN ACD Duration	Represents the average time that callers waited before abandoning a call.	<ul style="list-style-type: none"> ■ ProjectStats ■ TimeAbanACDCalls 	Calculate the sum of (TimeAbanACDCalls) divided by the sum of (TotAbanACDCalls).

Table 21–4 (Cont.) Daily Project Performance Report: Time Measures (AVG) Area

Item	Description	Table	Calculation
Wrap ACD Duration	Represents the average wrap-up time for ACD calls.	<ul style="list-style-type: none"> ■ ProjectStats ■ TimeWrapACDCalls 	Calculate the sum of (TimeWrapACDCalls) divided by the sum of (TotWrapACDCalls).
Max ABND	Longest time an ACD call was in the queue before abandoning the call.	<ul style="list-style-type: none"> ■ ProjectStats ■ MaxTAbanACD 	Max (MaxTAbanACDCalls).
Total <date>	For each day of a project, this time is the total duration for each Time Measures item.	<ul style="list-style-type: none"> ■ ProjectStats 	Not applicable.
Total <Project Name>	Represents the average time for each item for the project, except Max, ABND ACD (Abandoned ACD), which represents the maximum wait to abandon element for the project.	<ul style="list-style-type: none"> ■ ProjectStats 	Not applicable.
Grand Total	Represents the average time for each item for all projects, except Max, ABND ACD (Abandoned ACD), which represents the maximum wait to abandon element for all projects.	<ul style="list-style-type: none"> ■ ProjectStats 	Not applicable.

Average Speed to Answer Area

The *Average Speed to Answer (ASA)* area shows the average time for the project to receive ACD calls.

[Table 21–5](#) describes the elements of the Average Speed to Answer area of the Daily Project Performance report, the corresponding tables, and the formula used in the calculation (where applicable).

Table 21–5 Daily Project Performance Report: Average Speed to Answer

Item	Description	Table	Calculation
ACD ASA	The average speed of answer (ASA) for ACD calls received by the project.	<ul style="list-style-type: none"> ■ Ans2-300ACDCalls ■ TotACDCalls 	Calculate the sum of (Ans2-300ACDCalls) divided by the sum of (TotAnsACDCalls).
Total <date>	The average speed of answer for ACD calls for the day.	<ul style="list-style-type: none"> ■ ProjectStats 	Not applicable.
<Project Name>	The average speed of answer for ACD calls for all days.	<ul style="list-style-type: none"> ■ ProjectStats 	Not applicable.
Grand Total	The average ACD ASA for all projects.	<ul style="list-style-type: none"> ■ ProjectStats 	Not applicable.

Interval Workgroup Performance Report

This topic describes the Interval Workgroup Performance report. The Interval Workgroup Performance report tracks workgroup activity in 15-minute intervals. It contains the following statistics:

- Number, type, and disposition of calls
- Service levels
- Collective time in ACD states
- Agent login activity and visibility into ACD states

When configuring the items to include on the Interval Workgroup Performance report, you can specify which workgroups and the report interval for which statistics will be included. These settings are configured on the Workgroups tab and the Report Interval tab, and are accessed from the Content tab. For more information on defining content using the Content tab, see "[Adding a New Advanced Report](#)" on page 21-5.

Workgroups include:

- All
- Specific

Report intervals include:

- 15 minutes
- 30 minutes
- 60 minutes
- Daily

Parts of the Interval Workgroup Performance Report

This topic describes the different parts of the Interval Workgroup Performance report:

- **Date(s).** The period between the start and end date.
Dates in this range that have no values for the report fields do not appear in the report.
- **Within Hours.** The period in hours that the report covers.
- **Workgroup(s).** The name of the workgroups identified in the Content tab.
- **Report Printed On.** The date and time, based on the time zone selection.
- **Page 1 of x.** Where *x* indicates the total number of pages.

The Interval Workgroup Performance report includes the following areas:

- "[Calls Area](#)" on page 21-16
- "[Service Level Area](#)" on page 21-17
- "[Time \(Totals\) Area](#)" on page 21-17
- "[Handled Time Area](#)" on page 21-19
- "[User Defined Threshold Area](#)" on page 21-19

Calls Area

The *Calls* area tracks the number and type of calls offered, the disposition of the call (answered, refused, abandoned, and so on), and the service level of the workgroup compared with its preset threshold.

[Table 21–6](#) describes the Calls area fields, tables, and formulas used in the calculations (where applicable) of the Interval Workgroup Performance report.

Table 21–6 *Interval Workgroup Performance Report: Calls Area*

Field	Description	Table	Calculation
Time	Represents the beginning of 15-minute interval.	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ StartIntervalTime 	Not applicable.
ACD In	Represents the total number of ACD calls offered within the interval.	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ TotACDCalls 	Calculate the sum of (TotACDCalls).
Abn ACD	Represents the total number of abandoned ACD calls within the interval.	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ TotAbanACDCalls 	Calculate the sum of (TotAbanACDCalls).
Ref ACD	Represents the total number of refused ACD calls during the interval. (ACD calls offered to the workgroup and not accepted.)	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ TotRefusedACDCalls 	Calculate the sum of (TotRefusedACDCalls).
Wrap ACD	Represents the total number of calls that went into wrap-up mode during the interval.	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ TotWrapACDCalls 	Calculate the sum of (TotWrapACDCalls).
ACD Xfered In	The number of ACD calls that were transferred into a workgroup during the interval.	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ TrxIn 	Calculate the sum of (TrxIn).
ACD Xfered Out	The number of ACD calls that were transferred out of the workgroup during the interval.	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ TrxOut 	Calculate the sum of (TrxOut).
ACD OVR In	The number of calls that were offered by overflowed conditions to the workgroup.	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ TotOVInACDCalls 	Calculate the sum of (TotOVInACDCalls).
ACD OVR Out	The number of calls that met the overflow criteria (although not necessarily answered by another workgroup).	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ TotOVOOutACDCalls 	Calculate the sum of (TotOvOutACDCalls).

Table 21–6 (Cont.) Interval Workgroup Performance Report: Calls Area

Field	Description	Table	Calculation
Total	The total number or percentage of each call item, for each workgroup (during the requested period).	None.	Not applicable.
Grand Total	The total number or percentage of each call item, for all selected workgroups combined (during the requested period).	None.	Not applicable.

Service Level Area

The *Service Level* area describes the service level percentage for each call item, for each workgroup during a specified period.

[Table 21–7](#) describes the fields, tables, and formulas used in the calculations (where applicable) in the Service Level area of the Interval Workgroup Performance report.

Table 21–7 Interval Workgroup Performance Report: Service Level Area

Field	Description	Table	Calculation
% Service Level	The percentage of calls answered by a workgroup compared to a target within the interval.	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ Ans2-300ACDCalls ■ TotABUACD ■ Abn2-300ACDCalls 	Calculate the sum (Ans2-300ACDCalls) divided by (SumTotABUACD) plus the sum of (TotAbn2-300ACDCalls).
Total	The average service-level percentage for each call item, for each workgroup (during the requested period).	None.	Not applicable.
Grand Total	The average service-level percentage for each call item, for all selected workgroups combined (during the requested period).	None.	Not applicable.

Time (Totals) Area

The *Time (Totals)* area tracks the time that agents were logged in during the interval, the cumulative time spent in the different ACD States (Busy, Available, On Break), Maximum Abandon and Answer Delay, and the Average Speed of Answer (ASA).

[Table 21–8](#) describes the Time (Totals) area fields, tables, and formulas used in the calculations (where applicable) of the Interval Workgroup Performance report.

Table 21–8 Interval Workgroup Performance Report: Time (Totals) Area

Field	Description	Table	Calculation
Logged In	Represents the cumulative total time users were logged in during the interval.	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ TimeUsersLoggedIn 	Calculate the sum of (TimeUsersLoggedIn).
Busy	The cumulative total time users spent in the Busy state during the interval.	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ TimeUsersBusy 	Calculate the sum of (TimeUsersBusy).
Avail	The cumulative total time users spent in the Available state during the interval.	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ TimeUsersAvailable 	Calculate the sum of (TimeUsersAvailable).
On Break	The cumulative total time users spent in the On Break state during the interval.	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ TimeUsersOnBrea 	Calculate the sum of (TimeUsersOnBreak).
Max Answer Delay	Represents the maximum time to answer a call during the interval.	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ MaxTABUACDCalls 	Calculate the sum of (MaxTABUACDCalls).
Max Abandon Delay	Represents the maximum time before the caller abandoned the call during the interval.	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ MaxTAbanACDCalls 	Calculate the sum of (MaxTAbanACDCalls).
ACD ASA	The average speed of answer during the interval.	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ AnsPreThre ■ TotACDCalls 	Calculate the sum of (TimeABUACDCalls) divided by TotACDCalls.
Total	The average total time for each Time field (except Max Answer Delay and Max Abandon Delay), for all workgroups combined (during the requested period).	None.	Not applicable.
Total <date>	The average time for each time field (except Max Answer Delay and Max Abandoned Delay) for the day.	None.	Not applicable.
Grand Total	The average time for each time field for all workgroups combined during the requested period.	None.	Not applicable.

Handled Time Area

The *Handled Time* area tracks the total and average ACD talk time.

[Table 21–9](#) describes the Handled Time area fields, tables, and formulas used in the calculations (where applicable) of the Interval Workgroup Performance report.

Table 21–9 Interval Workgroup Performance Report: Handled Time Area

Field	Description	Table	Calculation
Total ACD Talk Time	Represents the total talk time (including hold time) for ACD calls during the interval.	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ TimeTalkACDCalls 	Calculate the sum of (TimeTalkACDCalls)
Avg ACD Talk Time	The average talk time (including hold time) for ACD calls during the interval.	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ TimeTalkACDCalls ■ TotABUACDCalls 	Calculate the sum of (TimeTalkACDCalls) divided by the sum of (TotABUACDCalls).
Total Wrap Time	The total time that users are in the wrap-up state for this workgroup for the interval.	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ TimeWrapACDCalls 	Calculate the sum of (TimeWrapACDCalls).
Avg Wrap Time	The average wrap-up time for each call.	The corresponding tables include: <ul style="list-style-type: none"> ■ WorkgroupStats ■ TimeWrapACDCalls ■ TotWrapACDCalls 	Calculate the sum of (TimeWrapACDCalls) divided by the sum of (TotWrapACDCalls).
Total	The total and average amount of time, for each Talk Time field, for each workgroup (during the requested period).	None.	Not applicable.
Grand Total	The total and average amount of time, for each Talk Time field, for all workgroups combined (during the requested period).	None.	Not applicable.

User Defined Threshold Area

The *User Defined Threshold* area tracks activity and performance thresholds.

[Table 21–10](#) describes the User Defined Threshold area fields, tables, and formulas used in the calculations (where applicable) of the Interval Workgroup Performance report.

Table 21–10 Interval Workgroup Performance Report: User Defined Threshold Area

Field	Description	Table	Calculation
Ans Pre Thresh	The number of ACD calls that were answered (Ans) within (less than) the user-defined threshold within the daily group.	The corresponding tables include: <ul style="list-style-type: none"> ▪ Ans2ACDCalls ▪ Ans300ACDCalls (where 2 is the minimum and 300 is the maximum)	Calculate the sum of (Ans2ACDCalls - Ans300ACDCalls).
% Ans Pre Thresh	The percentage of ACD calls that were answered (Ans) within (less than) the user-defined threshold within the daily group.	The corresponding tables include: <ul style="list-style-type: none"> ▪ Ans2ACDCall ▪ Ans300ACDCalls ▪ TotAbuACDCalls (where Abu indicates Answered By the User)	Calculate the sum of (Ans2ACDCalls - Ans300ACDCalls) divided by the sum of (TotAbuACDCalls).
Ans Post Thresh	The number of ACD calls that were answered (Ans) after (greater than) the user-defined threshold within the daily group.	The corresponding tables include: <ul style="list-style-type: none"> ▪ Ans2ACDCalls ▪ Ans300ACDCalls 	Calculate the sum of (Ans2ACDCalls - Ans300ACDCalls).
% AnsPost Thresh	The percentage of ACD calls that were answered (Ans) after (greater than) the user-defined threshold within the daily group.	The corresponding tables include: <ul style="list-style-type: none"> ▪ Ans2ACDCalls ▪ Ans300ACDCalls ▪ TotAbuACDCalls 	Calculate the sum of (Ans2ACDCalls - Ans300ACDCalls) divided by the sum of (TotAbuACDCalls).
Abn Pre Thresh	The number of ACD calls that were abandoned (Abnd) before (less than) the user-defined threshold within the daily group.	The corresponding tables include: <ul style="list-style-type: none"> ▪ Abnd2ACDCalls-Abnd300ACDCalls ▪ TotAbndACDCalls 	Calculate the sum of (Abnd2ACDCalls - Abnd300ACDCalls).
% Abn Pre Thresh	The percentage of ACD calls that were abandoned (Abnd) before (less than) the user-defined threshold within the daily group.	The corresponding tables include: <ul style="list-style-type: none"> ▪ Abnd2ACDCalls-Abnd300ACDCalls ▪ TotAbndACDCalls 	Calculate the sum of (Abnd2ACDCalls - Abnd300ACDCalls) divided by the sum of (TotAbndACDCalls).
Abn Post Thresh	The number of ACD calls that were abandoned after (greater than) the user-defined threshold within the daily group.	The corresponding tables include: <ul style="list-style-type: none"> ▪ Abnd2ACDCalls-Abnd300ACDCalls ▪ TotAbndACDCalls 	Calculate the sum of (Abnd2ACDCalls-Abnd300ACDCalls).
% Abn Post Thresh	The percentage of ACD calls that were abandoned after (greater than) the user-defined threshold within the daily group.	The corresponding tables include: <ul style="list-style-type: none"> ▪ Abnd2ACDCalls-300ACDCalls ▪ TotAbndACDCalls 	Calculate the sum of (Abn2 minus 300ACDCalls) divided by the sum of (TotAbndACDCalls).

Table 21–10 (Cont.) Interval Workgroup Performance Report: User Defined Threshold

Field	Description	Table	Calculation
Custom Service Level	The percentage of calls that were answered within n seconds (where x is a Service Level time factor defined as a variable for the report).	The corresponding tables include: <ul style="list-style-type: none"> Ans2ACDCalls-Ans300ACDCalls TotAbuACDCalls Abnd2ACDCalls-Abnd300ACDCalls 	Calculate the sum of (Ans2ACDCalls - Ans300ACDCalls) divided by the sum of (TotAbuACDCalls) plus the sum of (Abnd2ACDCalls - Abnd300ACDCalls).
Total	The total number or percentage of each field for the workgroup.	None.	Not applicable.
Grand Total	The total number or percentage for each field for all workgroups.	None.	Not applicable.

User Login/Logout Report

This topic describes the User Login/Logout report. The User Login/Logout report tracks, by user (agents and supervisors), the user's login and logout activity, the duration of the login, and the logout reason for a specified date and time.

Parts of the User Login/Logout Report

This topic describes the different parts of the User Login/Logout report:

- **Date(s).** The start and end dates for the period.
- **Users.** The users included in the report, as indicated in the Content tab.
- **Report Printed On.** The date and time, based on the time zone selection.
- **Page 1 of x.** Where x indicates the total number of pages.

[Table 21–11](#) describes the *Login/Logout* area elements, the corresponding tables, and the formulas used in calculations (where applicable) of the User Login/Logout report.

Table 21–11 User Login/Logout Report: Login/Logout Area

Field	Description	Table	Calculation
Name	Represents the user name.	<ul style="list-style-type: none"> userlogin userid 	Not applicable.
Date	Represents the date of login.	userlogin	Not applicable.
Event Time	Represents the time of login and logout.	UserStats <ul style="list-style-type: none"> logindate 	Not applicable.
Type	Represents the agent's activity (login and logout) associated with each event time.	userlogin <ul style="list-style-type: none"> logintype 	Not applicable.
Duration	Represents the duration of login.	UserStats <ul style="list-style-type: none"> duration 	Calculate the sum of (Duration).

Table 21–11 (Cont.) User Login/Logout Report: Login/Logout Area

Field	Description	Table	Calculation
Logout Reason	The reason for logout options are: <ul style="list-style-type: none"> ■ 0 indicates agent logout ■ 1 indicates Web session timeout ■ 2 indicates agent inactivity ■ 3 indicates resource shutdown ■ 4 indicates second login ■ 5 indicates supervisor logout ■ 6 indicates login by phone 	userlogin <ul style="list-style-type: none"> ■ logoutreason 	Not applicable.
Total	The total login duration for all selected agents.	userlogin <ul style="list-style-type: none"> ■ Date ■ duration 	Date plus duration.
Average	The average login duration for all agents.	None.	The total login duration divided by the number of agents reported.

User Hourly Average Report

This topic describes the User Hourly Average report. The User Hourly Average report highlights individual agent performance by time in ACD status, call counts, call types, and talk time. It provides information on hourly agent activity, including calls handled, along with time spent in different ACD States. Use this report to assist contact center management in determining average performance for agents compared to reasonable expectations.

Note: You can also configure this report to show all activity by all projects or for selected individual projects.

Parts of the User Hourly Average Report

This topic describes the different parts of the User Hourly Average report:

- **Date(s).** The period between the start and end dates.
- **Users.** The users identified in the Content tab.
- **Report Printed On.** The date and time, based on the time zone selection.
- **Page 1 of x.** Where *x* indicates the total number of pages.

[Table 21–12](#) describes the User Hourly Average report elements, the corresponding tables, and the formulas used in the calculation (where applicable).

Table 21–12 User Hourly Average Report

Item	Description	Table	Calculation
Date	The date of user activity.	The corresponding tables include: <ul style="list-style-type: none"> ▪ UserStats ▪ StartDate ▪ EndDate 	None.
Average Calls Per Hour	The average number of calls handled for each hour.	The corresponding tables include: <ul style="list-style-type: none"> ▪ UserStats ▪ TotACDCalls ▪ TimeUserLoggedIn 	(TotACDCalls divided by TimeUserLoggedIn (in seconds)) multiplied by 3600 seconds.
Average Talk Time	The average time spent talking on phone calls (including hold time).	The corresponding tables include: <ul style="list-style-type: none"> ▪ UserStats ▪ TimeTalkACDCalls ▪ TimeUserLoggedIn 	(TimeTalkACDCalls divided by TimeUserLoggedIn (in seconds)) multiplied by 3600 seconds.
Average Available Time	The average time spent in the Available state.	The corresponding tables include: <ul style="list-style-type: none"> ▪ UserStats ▪ TotUserAvailable ▪ TimeUserLoggedIn 	(TotUserAvailable) divided by TimeUserLoggedIn (in seconds) multiplied by 3600 seconds.
Average Busy Time	The average time spent in the Busy state.	The corresponding tables include: <ul style="list-style-type: none"> ▪ UserStats ▪ TotUserBusy ▪ TimeUserLoggedIn 	(TotUserBusy divided by TotLoggedIn (in seconds)) multiplied by 3600 seconds.
Average Break Time	The average time spent in the On Break state.	The corresponding tables include: <ul style="list-style-type: none"> ▪ TimeUserOnBreak ▪ TimeUserLoggedIn 	(TotUserOnBreak divided by TotLoggedIn (in seconds)) multiplied by 3600 seconds.
Average Hold Time	The average time spent in the Hold state.	The corresponding tables include: <ul style="list-style-type: none"> ▪ TimeHoldACDCalls ▪ TimeUserLoggedIn 	(TimeHoldACDCalls divided by TotLoggedIn (in seconds)) multiplied by 3600 seconds.
Average Wrap Time	The average time spent in the Wrap-up state.	The corresponding tables include: <ul style="list-style-type: none"> ▪ TimeWrapACDCalls ▪ TimeUserLoggedIn 	(TimeWrapACDCalls divided by TotLoggedIn (in seconds)) multiplied by 3600 seconds.
Average Handle Time	The average time to process calls.	The corresponding tables include: <ul style="list-style-type: none"> ▪ TimeTalkACDCalls ▪ TimeWrapACDCalls ▪ TotACDCalls 	(TimeTalkACDCalls plus TimeWrapACDCalls) divided by TotACDCalls.

Table 21–12 (Cont.) User Hourly Average Report

Item	Description	Table	Calculation
Total	The average time of each item, for each agent in the report.	The corresponding tables include: <ul style="list-style-type: none"> ▪ UserStats ▪ TimeUserLoggedIn 	Not applicable.
Grand Total	The average time of each item, for all agents in the report.	The corresponding tables include: <ul style="list-style-type: none"> ▪ UserStats ▪ TimeUserLoggedIn 	Not applicable.

Daily User Performance Report

The Daily User Performance report provides visibility into daily agent activity, including time spent in different ACD states, call counts, and talk time. Use this report to assist contact center management in monitoring agent performance against reasonable expectations.

Note: You can also configure this report to show all activity by all users.

Parts of the Daily User Performance Report

This topic describes the various parts of the Daily User Performance report:

- **Dates.** The period between the start and end dates.
- **Users.** The user names selected from the Contents - Users tab.

Note: The names are listed alphabetically on the report by last name and then first name.

- **Report Printed On.** The date and time, based on the time zone selection.
- **Page 1 of x.** Where *x* indicates the total number of pages.

The report includes the following areas:

- ["Status Time Area"](#) on page 21-24
- ["Call Counts Area"](#) on page 21-25
- ["Talk Time \(Total\) Area"](#) on page 21-26
- ["Talk Time \(Average\) Area"](#) on page 21-27

Status Time Area

The *Status Time* area provides information on user login time, as well as the time that users spent in various states.

[Table 21–13](#) describes the report elements, their corresponding tables, and the formulas for calculations (where applicable).

Table 21–13 Daily User Performance Report: Status Time Area

Item	Description	Table	Calculation
Login Time	The total time the user was logged in to Oracle Contact On Demand.	The corresponding tables include: <ul style="list-style-type: none"> ■ UserStats ■ UserLoggedIn 	Calculate the sum of (TimeUserLoggedIn).
Avail Time	The total time the user was in the available state.	The corresponding tables include: <ul style="list-style-type: none"> ■ UserStats ■ TimeUserAvailable 	Calculate the sum of (TimeUserAvailable).
Busy Time	The total time user was in the busy state.	The corresponding tables include: <ul style="list-style-type: none"> ■ UserStats ■ TimeUserBusy 	Calculate the sum of (TimeUserBusy).
Break Time	The total time user was in the on break state.	The corresponding tables include: <ul style="list-style-type: none"> ■ UserStats ■ TimeUserOnBreak 	Calculate the sum of (TimeUserOnBreak).
Total	The total time the user was in each state (for each of the Status Time fields).	UserStats	Not applicable.
Grand Total	The total time, in each state, for all users (for each of the Status Time fields).	UserStats	Not applicable.

Call Counts Area

The *Call Counts* area provides information on inbound, outbound calls received and made by users, and ACD calls received and refused.

[Table 21–14](#) describes the report elements, corresponding tables, and formulas that are used for the calculation (where applicable).

Table 21–14 Daily User Performance Report: Call Counts Area

Item	Description	Table	Calculation
In Calls	The number of direct inbound calls received by the user during this period.	The corresponding tables include: <ul style="list-style-type: none"> ■ UserStats ■ TotInCalls 	Calculate the sum of (TotInCalls).
Out Calls	The number of outbound calls that the user made during this period.	The corresponding tables include: <ul style="list-style-type: none"> ■ UserStats ■ TotOutCalls 	Calculate the sum of (TotOutCalls).
ACD Calls	The number of ACD calls that the user received during this period.	The corresponding tables include: <ul style="list-style-type: none"> ■ UserStats ■ TotACDCalls 	Calculate the sum of (TotACDCalls).

Table 21–14 (Cont.) Daily User Performance Report: Call Counts Area

Item	Description	Table	Calculation
Refused ACD Calls	The number of ACD calls that the user refused during this period.	The corresponding tables include: <ul style="list-style-type: none"> ■ UserStats ■ TotRefusedACDCalls 	Calculate the sum of (TotRefusedACDCalls).
Internal Calls In	The number of internal extension calls received during this period.	The corresponding tables include: <ul style="list-style-type: none"> ■ UserStats ■ TotInternalInCalls 	Calculate the sum of (TotInternalInCalls).
Internal Calls Out	The number of internal outbound extension calls that the user made during this period.	The corresponding tables include: <ul style="list-style-type: none"> ■ UserStats ■ TotInternalOutCalls 	Calculate the sum of (TotInternalOutCalls).
Total	The total number of calls that the user made for each all type (for each of the Call Counts fields).	UserStats	Not applicable.
Grand Total	The total number of calls, in each state, for all users (for each of the Call Counts field	UserStats	Not applicable.

Talk Time (Total) Area

The *Talk Time (Total)* area provides information on total talk time, including the totals for inbound and outbound calls, and ACD calls (time on hold, wrap-up, and interactions).

[Table 21–15](#) describes the Talk Time (Total) area of the Daily User Performance report, the corresponding tables, and the formula used in the calculation (where applicable).

Table 21–15 Daily User Performance Report: Talk Time (Total) Area

Item	Description	Table	Calculation
In Talk Time	The total talk time for inbound calls (including hold time).	TimeTalkInCalls	Calculate the sum of (TimeTalkInCalls).
Out Talk Time	The total talk time for outbound calls (including hold time).	TimeTalkOutInCalls	Calculate the sum of (TimeTalkOutInCalls).
ACD Talk Time	The total talk time for ACD calls (including hold time).	The corresponding tables include: <ul style="list-style-type: none"> ■ TimeTalkACDCalls ■ TotACDCalls 	Calculate the sum of (TimeTalkACDCalls).
ACD Hold Time	The total time on hold for ACD calls.	TimeHoldACDCalls	Calculate the sum of (TimeHoldACDCalls).
ACD Wrap Time	The total time in wrap-up for ACD calls.	TimeWrapACDCalls	Calculate the sum of (TimeWrapACDCalls).

Table 21–15 (Cont.) Daily User Performance Report: Talk Time (Total) Area

Item	Description	Table	Calculation
Total Handle Time	The total time spent handling ACD call interactions.	The corresponding tables include: <ul style="list-style-type: none"> ▪ TimeTalkACDCalls ▪ TimeHoldACDCalls ▪ TimeWrapACDCalls 	Calculate the sum of (TimeTalkInCalls) plus (TimeWrapACDCalls) .
Total	The total time for all calls of each call type for the user (for each of the Talk Time fields).	ProjectStats	Not applicable.
Grand Total	The total time for all calls, in each state, for all users (for each of the Talk Time fields).	ProjectStats	Not applicable.

Talk Time (Average) Area

The *Talk Time (Average)* area shows the average time for the project to receive ACD calls.

[Table 21–16](#) describes the Talk Time (Average) area of the Daily User Performance report, the corresponding tables, and the formula used in the calculation (where applicable).

Table 21–16 Daily User Performance Report: Talk Time (Average) Area

Item	Description	Table	Calculation
In Talk Time	The total talk time for all internal calls that the user received.	TimeTalkInCalls	Calculate the sum of (TimeTalkInCalls) divided by TotInCalls.
Out Talk Time	The average talk time for all outbound calls that the user generated.	TimeTalkOutInCalls	Calculate the sum of (TimeTalkOutInCalls) divided by the sum of (TotOutCalls).
ACD Talk Time	The average talk time for all ACD calls that the user received.	The corresponding tables include: <ul style="list-style-type: none"> ▪ TimeTalkACDCalls ▪ TotACDCalls 	Calculate the sum of (TimeTalkACDCalls) divided by the sum of (TotACDCalls).
ACD Hold Time	The average time for all ACD calls that the user placed on hold.	TimeHoldACDCalls	Calculate the sum of (TimeHoldACDCalls) divided by Count(TimeHoldACDCalls).
ACD Wrap Time	The average time for all ACD calls that the user placed in the wrap-up state.	TimeWrapACDCalls	Calculate the sum of (TimeWrapACDCalls) divided by Count(TimeWrapACDCalls).
Avg Handle Time	The average time that the user spent handling all ACD calls.	The corresponding tables include: <ul style="list-style-type: none"> ▪ TimeTalkACDCalls ▪ TimeHoldACDCalls ▪ TimeWrapACDCalls 	Calculate the sum of (TimeTalkInCalls) plus the sum of (TimeWrapACDCalls) divided by the sum of (TotACDCalls).

Table 21–16 (Cont.) Daily User Performance Report: Talk Time (Average) Area

Item	Description	Table	Calculation
Total	The average time for all calls, of each call type, for all users (for each of the Talk Time fields).	UserStats	Not applicable.
Grand Total	The average time for all calls, in each state, for all users (for each of the Talk Time fields).	UserStats	Not applicable.

Peak Interactions Report

This topic describes the Peak Interactions report. The Peak Interactions report tracks the maximum number of interactions used by Oracle Contact On Demand, reported in preset intervals for the company.

Parts of the Peak Interactions Report

This topic describes the different parts of the Peak Interactions report:

- **Company name.** The name of the company.
- **Start Date and End Date.** The period between the start and end dates.
- **Report Printed On.** The date and time, based on the time zone selection.
- **Page 1 of x.** Where *x* indicates the total number of pages.

[Table 21–17](#) describes the Peak Interactions report elements, the corresponding tables, and the formulas used in calculations (where applicable).

Table 21–17 Peak Interactions Report

Item	Description	Table	Calculation
Intervals	The time interval.	None.	Not applicable.
Interactions	The maximum number of interactions during the interval.	InteractionsPeak <ul style="list-style-type: none"> ■ peakInteractions 	Not applicable.
Logins	The maximum number of logins during the interval.	InteractionsPeak <ul style="list-style-type: none"> ■ peakLogins 	Not applicable.
Calls	The maximum number of calls during the interval.	InteractionsPeak <ul style="list-style-type: none"> ■ peakCalls 	Not applicable.
Chats	The maximum number of chats during the interval.	InteractionsPeak <ul style="list-style-type: none"> ■ peakChats 	Not applicable.
Emails	The maximum number of emails during the interval.	InteractionsPeak <ul style="list-style-type: none"> ■ peakEmails 	Not applicable.
Overall	The maximum number of simultaneous logins, interactions, calls, chat, emails of the company during the requested period.	InteractionsPeak <ul style="list-style-type: none"> ■ peakEmails ■ peakLogins ■ peakCalls ■ peakChats 	Not applicable.

System Peak Interactions Report

The System Peak Interactions report tracks the number of system peak interactions in 15-minute intervals. This number is determined from the Interactions Peak table in the Oracle Contact On Demand database.

Caution: To insert the System Peak interactions, the Company 1 StatServer (the StatServer for the company ASP) must be running. Locking the StatServer for the company ASP becomes an issue if the customer does not use Company 1.

Table 21–18 describes the System Peak Interactions report elements and the corresponding tables.

Table 21–18 System Peak Interactions Report

Item	Description	Table
Intervals	Time intervals.	InteractionsPeak
Interactions	The maximum number of interactions during the interval.	<ul style="list-style-type: none"> ■ InteractionsPeak ■ peakInteractions
Logins	The maximum number of logins during the interval.	<ul style="list-style-type: none"> ■ InteractionsPeak ■ peakLogins
Calls	The maximum number of calls during the interval.	<ul style="list-style-type: none"> ■ InteractionsPeak ■ peakCalls
Chats	The maximum number of chats during the interval.	<ul style="list-style-type: none"> ■ InteractionsPeak ■ peakChats
Emails	The maximum number of emails during the interval.	<ul style="list-style-type: none"> ■ InteractionsPeak ■ peakEmails
Overall	The maximum number of simultaneous logins, interactions, calls, chat, emails in Oracle Contact On Demand during the requested period.	<ul style="list-style-type: none"> ■ InteractionsPeak ■ peakChats ■ peakEmails ■ peakCalls ■ peakLogins

Interaction Outcome by Workgroup Report

The Interaction Outcome by Workgroup report tracks interactions by outcome, number of interactions for each outcome duration, and the average duration.

Note: You can also configure this report to show all activities by all workgroups or for selected workgroups.

Parts of the Interaction Outcome by Workgroup Report

This topic describes the different parts of the Interaction Outcome by Workgroup report:

- **Date(s).** The period between the start and end dates.
- **Workgroup(s).** The name of the workgroups identified in the Content tab.

- **Report Printed On.** The date and time, based on the time zone selection.
- **Page 1 of x.** Where *x* indicates the total number of pages.

Table 21–19 describes the Interaction Outcome by Workgroup report elements, the corresponding tables, and the formulas used in calculations (where applicable).

Table 21–19 Interaction Outcome by Workgroup Report

Item	Description	Table	Calculation
Date	The date of the selected outcome.	None.	Not applicable.
Outcome	The name of the outcome selected for the interaction type.	None.	Not applicable.
Total Time of Interaction	The total time of the interaction, including queue time, talk time, and wrap-up time.	The corresponding tables include: <ul style="list-style-type: none"> ■ TimeABUACDCalls ■ TimeTalkACDCalls ■ TimeWrapACDCalls (These tables are repeated for each media type.)	Calculate the sum of (TimeABUACDCalls) plus the sum of (TimeTalkACDCalls) plus the sum of (TimeWrapACDCalls). (This calculation is repeated for each media type.)
Count of Interaction	The number of answered interactions.	TotABUACDCalls (This table is repeated for each media type.)	Calculate the sum of (TotalABUACDCalls). (This calculation is repeated for each media type.)
Average Interaction Duration	The average time of the interaction.	The corresponding tables include: <ul style="list-style-type: none"> ■ TimeABUACDCalls ■ TimeTalkACDCalls ■ TimeWrapACDCalls ■ TotABUACDCalls (These tables are repeated for each media type.)	[Calculate the sum of (TimeABUACDCalls) plus the sum of (TimeTalkACDCalls) plus the sum of (TimeWrapACDCalls)] divided by TotABUACDCalls. (This calculation is repeated for each media type.)

Service Billing Report by Project

The Service Billing Report by Project shows the transaction times and billing rates by project, for a specified period.

Note: You can also configure this report to show all activities by all projects or for selected projects.

Table 21–20 describes the Service Billing Report by Project elements, the corresponding tables, and the formulas used in calculations (where applicable).

Table 21–20 Service Billing Report by Project

Item	Description	Table	Calculation
Project	The name of the project.	None	Not applicable
Date	The date of the project.	None	Not applicable

Table 21–20 (Cont.) Service Billing Report by Project

Item	Description	Table	Calculation
Shift	The time the project ran.	None.	Not applicable.
Number of Interactions	The total number of interactions for the project.	None.	Not applicable.
Total Talk Time	The sum of all talk time (including hold time) for all interactions handled by the project.	<ul style="list-style-type: none"> ■ TimeTalkACDCalls ■ TimeTalkACDCChats ■ TimeTalkACDEMail ■ TimeTalkACDWCB 	Calculate the sum of (TimeTalkACDCalls). (Repeat the calculation for each media selected.)
Total Wrap-up Time	The sum of all wrap-up time for all interactions handled by the project.	<ul style="list-style-type: none"> ■ TimeWrapACDCalls ■ TimeWrapACDCChats ■ TimeWrapACDEMail ■ TimeWrapACDWCB 	Calculate the sum of (TimeWrapACDCalls). (Repeat the calculation for each media selected.)
Total Handle Time	The total handle time for each interaction.	<ul style="list-style-type: none"> ■ TimeTalk(MediaType) ■ TimeWrap(MediaType) 	Calculate the sum of (TimeTalk Selected Media Types) plus the sum of (TimeWrap Selected Media Types).
Average Talk Time (for transactions)	The average talk time for each interaction type.	<ul style="list-style-type: none"> ■ TimeTalk(MediaType) ■ TotABU(MediaType) 	Calculate the sum of (TimeTalk(MediaType)) divided by the sum of (TotABU(MediaTypes)).
Average Wrap-up Time (for transactions)	The average wrap-up time for each interaction type.	<ul style="list-style-type: none"> ■ TimeWrap(MediaType) ■ TotABU(MediaType) 	Calculate the sum of (TimeWrap(MediaType)) divided by the sum of (TotABU(MediaTypes)).
Average Handle Time (for transactions)	The average handle time for each interaction type (including hold time).	<ul style="list-style-type: none"> ■ TimeTalk(MediaType) ■ TimeWrap(MediaType) ■ TotABU(MediaType) 	Calculate the sum of (TimeTalk(MediaType)) plus the sum of (TimeWrap(MediaTypes)) divided by the sum of (TotABU(MediaTypes)).
Total Billing / Minute	Total talk time (rounded to the nearest minute) by media type, multiplied by the billing rate for each minute for the project.	<ul style="list-style-type: none"> ■ TimeTalk(MediaType) ■ TimeWrap(MediaType) 	Calculate the sum of (TimeTalk(MediaType)) multiplied by the Billing Rate for each Minute.
Total Billing / Interaction	Total handled interactions multiplied by the billing rate for each call.	None.	Calculate the sum of all Interactions multiplied by Billing Rate for each Call.

Table 21–20 (Cont.) Service Billing Report by Project

Item	Description	Table	Calculation
Project Total	The total (or average) of items for each project.	ProjectStats	<p>The total for the following fields is calculated:</p> <ul style="list-style-type: none"> ■ Number of Interactions ■ Total Talk Time ■ Total Wrap-up Time ■ Total Billing/Minute ■ Total Billing/Interaction <p>The average for the following fields is calculated:</p> <ul style="list-style-type: none"> ■ Average Talk Time ■ Average Wrap-up Time ■ Average Handle Time
Total	The total (or average) of items for all projects combined.	ProjectStats	<p>The total for the following fields is calculated:</p> <ul style="list-style-type: none"> ■ Number of Interactions ■ Total Talk Time ■ Total Wrap-up Time ■ Total Billing/Minute ■ Total Billing/Interaction <p>The average for the following fields is calculated:</p> <ul style="list-style-type: none"> ■ Average Talk Time ■ Average Wrap-up Time ■ Average Handle Time

User Status Duration Report

This topic describes the User Status Duration report. The User Status Duration report tracks agent activity using the user-defined agent statuses. It provides more detail about how agents spend their time compared with the standard ACD statuses of Available, Busy, and On Break.

This report tracks the following information:

- User
- Date
- Status (company defined)
- Duration
- ACD Status (system default)
- Percentage of total

Use this report to assist contact center management in determining how a specific user spends time compared with other users.

Note: You can also configure this report to show all activities by all users or for selected users.

Parts of the User Status Duration Report

This topic describes the different parts of the User Status Duration report:

- **Date(s).** The period between the start and end dates.
- **Users.** The names of the users, as indicated in the Content tab.
- **Report Printed On.** The date and time, based on the time zone selection.
- **Page 1 of x.** Where *x* indicates the total number of pages.

[Table 21–21](#) describes the User Status Duration report elements, the corresponding tables, and the formulas used in the calculations (where applicable).

Table 21–21 *User Status Duration Report*

Item	Description	Table	Calculation
Status	The name of the user-defined status.	The corresponding tables include: <ul style="list-style-type: none"> ■ UserStatusName ■ Name 	Not applicable.
Duration	The cumulative time spent in the status.	The corresponding tables include: <ul style="list-style-type: none"> ■ UserStatusDuration ■ Duration 	Not applicable.
ACD State	The ACD status (Available, Busy, or On Break) that corresponds to the user-defined status.	The corresponding tables include: <ul style="list-style-type: none"> ■ UserStatus ■ UserStatusID 	Not applicable.
% of Total	The time the user spent in each status as a percentage of the total duration signed in for that day. Note: This percentage might not equal 100 percent for the total.	The corresponding tables include: <ul style="list-style-type: none"> ■ UserStatusName ■ UserStatusDuration ■ TimeUserLoggedIn 	Calculate the sum of (UsersStatusDuration) divided by the sum of (TimeUserLoggedIn).
First Log In	The timestamp of the first login of the day.	None.	Not applicable.
Last Logout	The timestamp of the last logout of the day. If the agent is logged in, this field is blank.	None.	Not applicable.
Total At Work Time	The total time of the user for the day. If the agent is still logged in, this field is blank.	TimeUserLoggedIn	Time difference between the user's first login timestamp and the last logout timestamp.

Table 21–21 (Cont.) User Status Duration Report

Item	Description	Table	Calculation
Total Busy	The total duration for the ACD status Busy. This duration includes the user-defined status as well as the ACD status.	TotUserBusy	Calculate the sum of (TotUserBusy).
Total Available	The total duration for the ACD status Available. This duration includes the user-defined status as well as the ACD status.	TotUserAvailable	Calculate the sum of (TotUserAvailable).
Total On Break	The total duration for the ACD status On Break. This duration includes the user-defined status as well as the ACD status.	TotUserOnBreak	Calculate the sum of (TotUserOnBreak).

Inbound Traffic Report by Project

The Inbound Traffic Report by Project counts the number of calls offered by area code and by exchange within that area code.

Note: You can also configure this report to show all activities by all projects or for selected projects.

[Table 21–22](#) describes the Inbound Traffic Report by Project elements, the corresponding tables, and the formulas for calculations (where applicable).

Table 21–22 Inbound Traffic Report by Project

Item	Description	Table	Calculation
DNIS	Project phone number (DNIS).	Projects	Not applicable.
Inbound Call Origin			
Area Code	Area code where the call originated.	Projects ANI	Not applicable.
EXC	The exchange where the call originated.	None.	Not applicable.
Total Calls Offered	Total number of calls offered to the project.	None.	Not applicable.
Total	The total number of inbound calls for each origin and for each project.	None.	Not applicable.
DNIS Total Calls	The total number of DNIS inbound calls from all origins for each project.	None.	Not applicable.
Grand Total	The total number of DNIS calls from all origins and for all projects combined.	None.	Not applicable.

Admin Audit Report

The Admin Audit report shows historical data of system-information changes in Administration Manager. This report includes the changes affecting all the company

pages, agent configurations, workgroup configurations, and project changes. It also identifies the user who made the change.

[Table 21-23](#) describes the Admin Audit report elements, the corresponding tables, and the formulas used in calculations (where applicable).

Table 21-23 Admin Audit Report

Item	Description	Table
Date	Server date of the transaction event.	audittransactiondbaction
Time	Server time of the transaction event.	audittransactiondbaction
TransID	The transaction identification number.	audittransactiondbaction
Username	The login identification of the user making the change in Administration Manager.	audittransactiondbaction
First Name, Last Name	The first and last name of the user making the change in Administration Manager.	audittransactiondbaction
Location	The IP address of the Web Server at the time of the change.	audittransactiondbaction

Table 21–23 (Cont.) Admin Audit Report

Item	Description	Table
Module	<p>The module that was modified (such as the option or the library).</p> <p>Options include:</p> <ul style="list-style-type: none"> ▪ company ▪ skills ▪ agents ▪ workgroups ▪ project menus ▪ projects ▪ schedules ▪ customer priority ▪ mail manager ▪ call blocking ▪ campaign <p>The libraries include:</p> <ul style="list-style-type: none"> ▪ agent statuses ▪ outcomes ▪ company prompts ▪ faxes ▪ SMTP Server ▪ SMTP Group ▪ POP3 Server ▪ email acknowledgements ▪ intelligent emails ▪ departments ▪ prefix routing patterns ▪ prefix routing group ▪ data sources ▪ display templates ▪ DNIS library ▪ matching pattern ▪ business events ▪ database connections ▪ host name ▪ agent phone mapping ▪ ANI ▪ parameter extensions ▪ configuration baseline 	<ul style="list-style-type: none"> ▪ audittransactiondbaction ▪ moduleid
Action	Identifies what the user did to modify Administration Manager (add, edit, or delete).	audittransactiondbaction
Query	Provides a View link, which shows the entire query or multiple queries for the action.	Not applicable.

Table 21–23 (Cont.) Admin Audit Report

Item	Description	Table
WebServices Host URL	The WebServices Host URL that is defined for each tenant.	WebServices Host URL

Security Audit Report

Note: The Security Audit report shows all system-security violations, such as failed login attempts and system actions. This report is available only to specific system and network administrators.

Table 21–24 describes the Security Audit report elements and the corresponding tables.

Table 21–24 Security Audit Report

Item	Description	Table
Flag	Error or event.	Not applicable.
Date	The date the event occurred.	Not applicable.
Time	The time the event occurred.	Not applicable.
Location	The client IP address or Web server IP address. If either address is not reported, the value shown will be null.	Not applicable.
First Name, Last Name	The first and last name of the user who created the event.	Not applicable.
Type	The user login type (agent, supervisor, guest supervisor, administrator, and so on).	Not applicable.
Events	A short description of the event (such as forced logout by supervisor).	Not applicable.

Platform Use Report

This report provides an overview of network traffic (consumption of resources and distribution of media types) for a specified period.

Table 21–25 describes the Platform Use report elements.

Table 21–25 Platform Use Report Elements

Heading	Item	Description
Company	Company Name	The name of the company or companies as defined in Oracle Contact On Demand.
Company	Sub-Total	The sub-total for all companies for which data is presented in the report, for the report period.
Company	All Total	The total for all companies for which data is presented in the report.
Package	Package	The package name defined for the company.
Configuration	Max. Agent Logins	The maximum agent logins defined for the company licensing. This value represents the licensing limit of simultaneous agent logins defined for the tenant.

Table 21–25 (Cont.) Platform Use Report Elements

Heading	Item	Description
Configuration	Agents Configured	The number of agent logins defined for the company.
Configuration	Max. Supv Logins	The maximum supervisor logins defined for the company licenses in the report period.
Configuration	Supervisors Configured	The number of supervisor logins defined for the company.
Inbound ACD Calls	Inbound Offered	The number of incoming calls offered to the tenant for all projects.
Inbound ACD Calls	Agent Handled	The incoming ACD calls handled by agents. If a call is transferred to another workgroup and answered, it will be handled multiple times.
Inbound ACD Calls	IVR Handled	Incoming ACD calls handled by IVR. These calls are handled by the IVR, without involving the agent.
Inbound ACD Calls	Abandoned	The number of incoming ACD calls offered to the tenant and abandoned. This number reflects the calls in the queue for the first project encountered. Calls queued for multiple workgroups, and transferred calls are not counted as abandoned
Outbound Direct and Preview	Outbound Attempts	The number of direct outbound calls and preview calls for the company. The total indicates all outbound calls.
Outbound Direct and Preview	Answer/Complete	The number of direct outbound calls and preview calls that were detected as answered by Oracle Contact On Demand and delivered to an agent. These calls include preview calls where the agent set the outcome to Answered.
Outbound Direct and Preview	Busy	The number of direct outbound calls and preview calls that were detected as busy by Oracle Contact On Demand. These calls include the number of preview calls where the agent set the outcome to Busy.
Outbound Direct and Preview	No Answer	The number of direct outbound calls and preview calls that were detected as No Answer by Oracle Contact On Demand. These calls include the number of preview calls where the agent set the outcome to No Answer.
Outbound Direct and Preview	Answering Machine	The number of direct outbound calls and preview calls that were detected by Oracle Contact On Demand as a response from an answering machine. These calls include the preview calls where the agents set the outcome to Answering Machine.
Outbound Direct and Preview	FAX	The number of direct outbound calls and preview calls that were detected as a fax machine by Oracle Contact On Demand. These calls include the preview calls where the agent set the outcome to Fax.
Outbound Direct and Preview	Abandon	The number of direct outbound calls and preview calls that were detected as answered. However, an agent was not available, and the call was abandoned.

Table 21–25 (Cont.) Platform Use Report Elements

Heading	Item	Description
Grand Total		The grand total amount represents the combined figure for the platform for all companies in which the data is being reported.

Tenant Use Report

The Tenant Use report provides configuration statistics for each company and the total of all companies within Oracle Contact On Demand. The report includes statistics on the features activated, user definitions and permissions, projects, and workgroups defined for each company.

[Table 21–26](#) describes the Tenant Use report elements.

Table 21–26 Tenant Use Report

Item	Description
Company	Names of the companies as defined in Oracle Contact On Demand.
Number of Tenants	Total number of companies represented in the report.
Package	Package name defined for the company.
Email, Voice Mail, Web Callback, Web Chat, Preview, Simple CRM (Contacts), CRM, Quality Recording and Transaction Recording	An x marks each feature that is activated within the company package for the tenant.
Agents	Number of user definitions that have the permission level of agent.
Supervisors	Number of user definitions that have the permission level of supervisor, or guest supervisor.
System Admin	Number of user definitions that have the permission level of system administrator.
Admin	Number of user definitions that have the permission level of administrator.
DNIS	Number of DNIS numbers defined in the DNIS library for the company.
Projects	Number of projects defined for the company.
Inbound Voice Projects	Number of voice projects defined for the company.
Email Projects	Number of email projects defined for the company.
Chat Projects	Number of email projects defined for the company.
Web Callback Projects	Number of Web callback projects defined for the company.
Fax Projects	Number of fax projects defined for the company.
Workgroups	Number of workgroups defined for the company.
Workgroup Voicemail Enabled	Number of workgroups that have enabled the voice mail option.
Total	The total of the statistics for each column for all companies. For the feature sets, the summation will include the number of companies where that feature set is activated.
Tenant	Number of tenants defined for the company.

Real Time Tenant Summary Report

The Real Time Tenant Summary report provides a summary of real-time statistics for each tenant.

Note: Tenant statistics are updated at periodic intervals according to a refresh timer set by the administrator. Using NetAdmin, the statistics can also be refreshed manually with the Refresh Now button on the report. This report is available only for NetAdmin users and cannot be scheduled.

[Table 21–27](#) describes the Real Time Tenant Summary report elements, which allows NetAdmin to monitor real-time tenant statistics.

Table 21–27 *Real Time Tenant Summary Report*

Item	Descriptions
Company	The tenant's company.
Users Logged In	Current number of total users logged into the company.
Agents Available	Current number of Agent user types that are in the Available state for the company.
Interaction Count	Total number of active interactions in Oracle Contact On Demand by tenant. This number includes interactions in the queue, being handling by agents, or by IVR.
Calls	Number of Calls in the queue for all projects, and currently in progress with IVR or being handled by agents.
Chats	Number of ACD Chats in the queue for all projects, and in progress with agents handling.
ACD Callbacks	Number of ACD Callbacks in queue for all projects and currently in progress with agents handling. This does not include rescheduled Voice Callbacks that are not due.
Web Callbacks	Number of Web Callbacks in the queue for all projects, and currently in progress with agents handling. This does not include rescheduled callbacks that are not due.
Outbound Calls	Number of Outbound Calls in the queue for outgoing resources, and currently in progress with agents handling.
Emails	Number of ACD Emails in the queue for all projects, and those currently being handled by agents.
Faxes	Number of Faxes in the queue for all projects, and those currently being handled by agents.
Voicemails	Number of voice mails in the queue for all projects, and those currently being handled by agents.
Abandoned Last 15 Seconds	Number of Abandoned ACD Calls within the last 15 seconds. After the initial display, the number appears as "-" until the first update is received.
TOTAL	Total of calculations for each column.
Refresh Now	Button used to refresh the statistics regardless of the timer setting.
Auto Refresh	Check to refresh the statistic within the timer setting.
Reset Timer	This button appears if the Auto Refresh option is checked. Click this button to reset the refresh timer while it is counting down.

Table 21–27 (Cont.) Real Time Tenant Summary Report

Item	Descriptions
Last Refresh Timer	Last time the statistic was refreshed.
Licensed, Active, and Exceeded Sessions	The number of licensed, active, and exceeded sessions for each tenant.

Note: The date and time of the last update to the view is displayed at the bottom of the view.

Configuration Baseline Report

The Configuration Baseline report provides information on all the initial configuration attributes. All subsequent changes to the configuration are documented and captured by means of version control.

Note: The Configuration Baseline report is available to administrators or other users with a higher level of permissions.

The output format for the report is in XML to allow viewing the configuration information in an expandable hierarchy format.

Configuring Data Retention

This appendix describes how to store call data, roll up and purge Oracle Contact On Demand statistical data, and archive recordings remotely. It includes the following topics:

- [About Data Retention](#)
- [Configuring Data Retention for Interval Statistics](#)
- [Configuring Data Retention for Interaction Detail](#)
- [Configuring Data Retention for Recordings](#)

About Data Retention

The Data Retention functionality allows contact center data to be stored online and within the Oracle Contact On Demand database. The Data Retention feature allows an administrator to configure the roll-up and purge of statistical data, and to store recordings remotely.

Note: Network administrator (NetAdmin) permissions are required to configure data retention.

The Data Retention page includes three tabs that allow you to manage data retention options:

- **Interval Statistics.** Settings that allow you to manage data in the Project, Workgroup, and Users statistics tables.
- **Interaction Detail.** Settings that allow you to manage data in the History Interactions tables.
- **Recordings.** Settings that allow you to manage transaction and quality recordings.

Configuring Data Retention for Interval Statistics

For compression and delete operations, an option is used to enable and disable the compression and the purge features. The options are disabled by default.

The options are as follows:

- Periodically compress Statistics Interval data to daily totals
- Periodically Delete Statistics Interval Data from System

To configure data retention for interval statistics

1. From the NetAdmin menu, choose Data Retention.
2. From the Data Retention page, click the Interval Statistics tab.
3. Select the appropriate data retention option (compress or delete), and then specify the values for the option that you selected.

The following table describes the options.

Data Retention Option	Description
The number of days to retain data before compressing	The number of days before the compression of 15-minute data to daily totals is triggered.
Daily Time for Event (GMT)	The scheduled time for the compression to take place. This field represents the time at which (in GMT) the compression will occur for all tenants.
Last Date/Time Event Completed	The date on which the last event completed successfully.

4. Click Apply and OK.
A warning message is displayed whenever changes are made to the Data Retention settings in the Interval Statistics window.
5. After reviewing the caution message, do one of the following:
 - Click OK to clear the message and proceed.
 - Click Cancel to return to the Data Retention view.

Configuring Data Retention for Interaction Detail

From the Interaction Detail tab, you can configure the settings for purging Interaction Detail data from Oracle Contact On Demand. An option enables and disables the feature. The option is disabled by default.

Caution: When you purge Interaction Detail data, other data is also deleted: Interaction History, Interaction Notes, and transcripts for chat, email, and fax.

To configure data retention for interaction detail data

1. From the NetAdmin menu, choose Data Retention.
2. From the Data Retention page, click the Interaction Detail tab.
3. Select the Periodically Delete Interaction Detail box, and then specify the values for each setting.

The following table describes the settings.

Data Retention Option	Description
Number of days to retain data before Deleting	The number of days to retain the interaction detail data before deleting it from the Oracle Contact On Demand database.
Daily time of the Event (GMT)	The scheduled time for the delete action to occur. This field represents the time at which (in GMT) the delete action occurs for all tenants.

Data Retention Option	Description
Last Date/Time Event Completed (GMT)	The date on which the last event completed successfully.

4. Click Apply and OK.
A warning message is displayed whenever changes are made to the Data Retention settings in the Interval Statistics window.
5. After reviewing the caution message, do one of the following:
 - Click OK to clear the message and proceed.
 - Click Cancel to return to the Data Retention view.

Configuring Data Retention for Recordings

From the Recordings tab, you can configure the settings for purging Quality Control recordings and Transaction Recordings from Oracle Contact On Demand. Transaction recordings can be deleted by agents. Purges of Quality Control recordings must be either initiated by a supervisor, or the action can be automated. An option enables and disables this feature. The option is disabled by default.

To configure data retention for recordings

1. From the NetAdmin menu, choose Data Retention.
2. From the Data Retention page, click the Recordings tab.
3. Select the Appropriate Data Retention option (Quality Recordings or Transaction Recordings), and then specify the values for the option you selected.

The following table describes the options.

Data Retention Option	Description
The number of days to retain data before compressing	The number of days to retain the recording files before deleting them (nnnn format).
Daily Time for Event (GMT)	The scheduled time for the compression to take place. This field represents the time at which (in GMT) the Oracle Contact On Demand action will occur for all tenants.
The number of days to retain metadata for search	This option triggers a purge of the interaction history or metadata after the number of days specified is exceeded. Note: If quality recordings must be accessible by Oracle Contact On Demand for 7 years (even if the recording is at a remote location and not in the main Oracle Contact On Demand database) the interaction history record must remain in Oracle Contact On Demand for that period. The recording itself can be archived to another location. However, the history record that contains the metadata used to retrieve the recording must also be maintained. If the record is purged, the recording might be available in an archive. However, retrieval will be managed outside of Oracle Contact On Demand.
Last Date/Time Event Completed	The date on which the last event completed successfully.

4. Click Apply and OK.

A warning message is displayed whenever changes are made to the Data Retention settings in the Interval Statistics window.

5. After reviewing the caution message, do one of the following:
 - Click OK to clear the message and proceed.
 - Click Cancel to return to the Data Retention view.

Customizing Application Interfaces

This appendix describes how to customize almost any text appearing on the Interaction Manager, Supervision Manager, or Administration Manager screens, provided that your contact center is configured to allow you to do so. It includes the following topics:

- [About Interface Object Keys and Resource Bundles](#)
- [Process of Customizing Interface Text](#)

Note: You cannot customize the new integrated client application. You can customize only to the Administration Manager and the legacy Interaction Manager applications.

About Interface Object Keys and Resource Bundles

While you cannot change the function of the controls and fields in Oracle Contact On Demand (with the exception of the legacy Interaction Manager screen, which you can customize), you can replace the titles, messages, and labels on the Oracle Contact On Demand user interfaces. You can modify these text elements to make the most sense to your agents, supervisors, and administrators. For more information on customizing Interaction Manager, see [Appendix C, "Extending Interaction Manager."](#)

Caution: Changes to the Oracle Contact On Demand workstation interfaces are system-wide, which means your changes affect all companies in the Oracle Contact On Demand database.

Interface object keys contain the text that displays to Oracle Contact On Demand users in Interaction Manager, Supervision Manager, and Administration Manager:

- Menu names
- Menu items
- Labels for check boxes, radio buttons, list boxes, and so on

A resource bundle is a file where Oracle Contact On Demand stores groups of related Interface Object Keys. For example, Oracle Contact On Demand stores most of the text that you can configure for Interaction Manager screens in a resource bundle called Interaction Manager.

Process of Customizing Interface Text

To customizing interface text, perform the following tasks:

- ["Finding and Changing Text"](#) on page B-2.
- ["Customizing Text"](#) on page B-3.
- ["Generating New Resource Bundle Files"](#) on page B-3.

Caution: Any text change that you make applies to every company.

Finding and Changing Text

In the Chat screen of legacy Interaction Manager 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.

This task is a step in ["Process of Customizing Interface Text"](#) on page B-2.

To find and change text

1. Log in to Administration Manager with the network administrator account (netadmin) account, and view the list of companies.
2. From the NetAdmin menu, choose Options, and then Resource Bundles.
The Resource Bundle window opens.
3. To modify a button name in legacy Interaction Manager, click the Resource Bundle list box, scroll down the list, and choose Interaction Manager.

Note: This is the resource file where Oracle Contact On Demand stores general text for legacy Interaction Manager.

Most of the resource files have obvious names. For example, a resource bundle called Agent Status contains agent status. However, not all of the text that you can customize for an application is in the same resource bundle. Oracle Contact On Demand might distribute of this text for Interaction Manager in approximately 10 different files.

4. At the top right of the Resource Bundle window, click Value.
5. In the field under the Key and Value buttons, type the word Collaborate, then click Go.

The search field also does a default substring search, so that:

- *Col* matches *Collaborate* and *Color* in Graph.
- You can also use the percent sign (%) as a wildcard character, 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 alternate 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 Oracle Contact On Demand supports.

8. When you finish entering the new text for the button, click OK.
9. Use Steps 3 through 8 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 obvious names.
 - Change the text in the Key page, and save your changes.

Customizing Text

There is a shortcut for finding text that you can customize, but it is supported only in Administration Manager. For more information on customizing text, see "[Finding and Changing Text](#)" on page B-2.

This task is a step in "[Process of Customizing Interface Text](#)" on page B-2.

To customize text

1. Find the text that you want to change. For example, in the Navigation bar, 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 Control+Shift+R.

The Resource Bundle window opens. The resource bundle file containing the text Skills is already selected by default. This shortcut makes it easy to find which of the Administration Manager resource bundle files contains the text that you want to edit.

3. 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.

This task is a step in "[Process of Customizing Interface Text](#)" on page B-2.

To generate new resource bundle files

1. Open the Resource Bundle window, and click 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 that you modified.

3. In the Language list box, select the language for which you created the new text (or select All).

4. Click Generate.

Oracle Contact On Demand generates new resource bundle files containing your changes, so that when agents log in later they will see your changes.

Extending Interaction Manager

This appendix describes how to customize Interaction Manager to integrate it with other external applications, such as Siebel CRM. It includes the following topics:

- [Adding a Tab and a Screen to Interaction Manager](#)
- [Interaction Parameters](#)
- [Starting an External Application](#)
- [Running an Executable from Interaction Manager](#)
- [About Capturing Contact Information from Preview Interactions](#)

Adding a Tab and a Screen to Interaction Manager

Add a control tab to the Interaction Manager interface to give agents access to a custom screen. Then, access and display interaction information to agents in that custom screen.

In Interaction Manager, you can:

- Display an additional control tab with a unique label.
- Display an HTML file.
- Access and use eight parameters describing the interaction properties.

When the agent clicks the custom tab, Interaction Manager displays the HTML or JSP file specified. When Interaction Manager receives a new interaction, it passes the parameters describing the interaction to your custom code. For information about the parameters code that you can access and use to interact with your custom code, see "[Interaction Parameters](#)" on page C-2.

To add a tab 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 field, type the text for the tab.
5. In the Include HTML File field, type the name of the HTML or JSP file to display when the agent clicks the custom tab.
6. Click OK.

Interaction Parameters

Each time Oracle Contact On Demand receives a new interaction, Interaction Manager 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.

[Table C-1](#) lists the interaction parameters. For more information on parameter extensions, see [Appendix E, "Parameters Passed to External Applications."](#)

Table C-1 *Interaction Parameters*

Parameter	Description
intid	Interaction ID
projectId	Project ID
From	Interaction ANI information
To	Interaction DNIS information
urlscriptId	Script ID
urlfaqId	FAQ ID
type	The interaction type can be one of the following: <ul style="list-style-type: none"> ■ 2001 indicates new inbound call ■ 2002 indicates new outbound call ■ 2004 indicates end call ■ 2005 indicates new inbound extension ■ 2006 indicates new outbound extension ■ 2007 indicates new ACD call ■ 2008 indicates new ACD Web callback ■ 2009 indicates new ACD callback ■ 2010 indicates new ACD Web phone ■ 2011 indicates new ACD chat ■ 2012 indicates new ACD email ■ 2013 indicates new ACD voice mail ■ 2014 indicates new ACD fax

Starting an External Application

Configure Interaction Manager workstations so that they start an external application when the following actions occur:

- Interaction Manager receives a new interaction.
- Interaction Manager accepts an interaction.
- An interaction in Interaction Manager becomes the active interaction when it is sent to an agent.

Running an Executable from Interaction Manager

To further customize your version of Oracle Contact On Demand, you might want to run an executable application, which is not provided with your version of Oracle Contact On Demand.

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 Interaction Manager:
 - a. Click the Enable custom tab in Interaction Manager.
 - b. In the Enter Text Label field, type a name for Oracle Contact On Demand.
 - c. In the Include HTML File field, type the URL of the file to load in the custom tab.
 - d. Indicate when Interaction Manager is to start Oracle Contact On Demand by choosing one of the following:
 - **Every time a new interaction is received.** Starts Oracle Contact On Demand every time Interaction Manager receives a new interaction.
 - **When a new interaction is accepted.** Starts Oracle Contact On Demand the first time that the agent accepts the new interaction.
 - **Each time an interaction is accepted.** Starts Oracle Contact On Demand every time that the agent makes the interaction the active interaction.
 - **After each interaction is complete.** Starts Oracle Contact On Demand every time that the agent completes an interaction
4. To invoke an external application without using the custom tab in Interaction Manager:
 - a. Click the External Application tab.
 - b. Select Enable external application to invoke from Interaction Manager.
 - c. In Oracle Contact On Demand to Invoke field, type the full path to the location of the executable.
 - d. From Oracle Contact On Demand Type list, select the window behavior:
 - **HTML Modal.** Opens a new Web browser window with the URL from Oracle Contact On Demand to Invoke field. (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 Oracle Contact On Demand to Invoke field. (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.** Starts a Windows32 executable.
 - **Enable external application.** Select Enable external application to invoke from Interaction Manager.

Note: You must install Oracle Contact On Demand to start it on all Interaction Manager workstations.

5. Identify when Interaction Manager is to start Oracle Contact On Demand by choosing:
 - **Every time a new interaction is received.** Starts Oracle Contact On Demand every time that Interaction Manager receives a new interaction
 - **When a new interaction is accepted.** Starts Oracle Contact On Demand the first time that the agent accepts the new interaction
 - **Every time an interaction is accepted.** Starts Oracle Contact On Demand every time that the agent makes the interaction as the active interaction
 - **After each interaction is complete.** Starts Oracle Contact On Demand every time that the agent completes an interaction
6. When Interaction Manager starts your application, Oracle Contact On Demand passes an array containing the following strings:
 - Interaction ANI information
 - Interaction DNIS information
 - Project ID
 - Script ID
 - QA ID
 - Interaction ID
 - Interaction Type

About Capturing Contact Information from Preview Interactions

The Interaction Manager Preview screens contains 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 Preview tabs of the Projects screen. For more information about capturing contact information from preview interactions, see ["Adding Chat Interactions to a Project"](#) on page 15-12.

When the agent is handling a preview interaction, Interaction Manager passes the parameters in [Table C-2](#). These parameters describe the contact that you supply to populate the script frame.

Table C-2 *Preview Contact Parameters*

Parameter	Description
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 Oracle Contact On Demand 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.

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 so that Supervisor Manager or Interaction Manager automatically passes the automatic number identification (ANI) for the customer to the HEAT Call Logging program. This appendix includes the following topics:

- [About 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](#)

About Configuring Administration Manager

A simple configuration process exists for both Administration Manager 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 the HEAT Call Logging program, you must also configure the HEAT Administrator. For more information on the HEAT Call Logging program, see "[Configuring HEAT Administrator](#)" on page D-2.

To enable Administration Manager support for the HEAT Call Logging program

1. Start Administration Manager.

Note: If you have permission, select the company that will be using HEAT Call Logging.

2. Click Options, Company, and then the CRM Integration tab.
3. Click the External Application subtab.

The External Application tab appears.

4. Select the option, Enable External Application to Invoke to invoke from Interaction Manager.
5. Complete the fields, and then click OK.

The following table describes the fields.

Field	Description
Application to Invoke	<p>If you are using the HEAT Call Logging program, your Oracle Contact On Demand installation includes a special executable called, HeatIntegration.exe.</p> <p>Oracle Contact On Demand uses this executable to pass customer ANI information to the Call Logging program. Every user (agent and supervisor) must have access to this program.</p> <p>Although you can install HeatIntegration.exe on every user's computer, 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 computer.</p> <p>In the Application to Invoke field, type the full path to the HeatIntegration.exe file (for example: y\HeatIntegration.exe)</p>
Application Type	You must select Win32 Window.
Run Application	<p>Select when to pass the customer ANI to the Call Logging program.</p> <p>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.</p>

Configuring HEAT Administrator

To enable support for Oracle Contact On Demand 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 window, select a data source, and then click OK.
3. In the HEAT Administrator login page, type your user ID and password, and then click OK.
4. When the HEAT Administrator module opens, select Defaults menu, DDE/Telephony, and then Telephony Setup.
5. In the Telephony Settings window, click the Enable Telephony tab, and do the following:
 - Select the Enable Telephony Integration option.
 - In the Telephony Application Name field, type HeatIntegration.
 - Click OK.
6. Click the DDE Service and Topic tab.
7. Use the information in the following table to complete the fields on the screen, and then 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 window:
 - Select the fields that you want to use when searching for the customer's ANI.
 - Click Add.
10. Click OK to save the changes.

The configuration for Oracle Contact On Demand Call Logging support is complete.

About Passing the Customer ANI to the Call Logging Program

To ensure that Oracle Contact On Demand passes the customer ANI to the HEAT Call Logging program, do the following:

- The user (agent or supervisor) must have Oracle Contact On Demand (Supervision Manager or Interaction Manager) and the Call Logging program running on the computer.
- 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.

Parameters Passed to External Applications

This appendix provides a list of the parameters that can be passed to another application that is necessary to start a Web page or application. It includes the following topics:

- [Parameters Passed to Web Pages](#)
- [Parameters Passed to Win32 Applications](#)
- [Web Parameters Passed for Chat and Web Callback](#)

Parameters Passed to Web Pages

[Table E-1](#) provides a list of parameters that Oracle Contact On Demand passes to the Web pages.

Table E-1 *Parameters Passed to Web Pages*

Parameter	Description
interactionId	A unique ID for each interaction system wide.
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 ID type. For a list of interaction types, see Table E-4 .
state	The State ID of the interaction. For a list of states, see Table E-3 .
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 name of the company with which the agent is associated.
companyId	The company ID of the company.
agentId	A unique agent ID number.
imFirstName	The contact's first name. Oracle Contact On Demand always passes this parameter, but does not add a value to this parameter unless a contact is assigned.

Table E-1 (Cont.) Parameters Passed to Web Pages

Parameter	Description
imLastName	The contact's last name. Oracle Contact On Demand always passes this parameter, but does not add a value to this parameter unless a contact is assigned.
imCompanyName	The contact's company name. Oracle Contact On Demand always passes this parameter, but does not add a value to this parameter unless a contact is assigned.
imContactId	The contact's ID. Oracle Contact On Demand always passes this parameter, but does not add a value to this parameter unless a contact is assigned.

Parameters Passed to Win32 Applications

You can configure Administration Manager so that an existing Web page or Win32 application starts. For more information on how to configure Administration Manager, see ["Integrating CRM with the Internet or a Win32 Application"](#) on page 5-17.

When the Web page or Win32 application starts on the agent's computer, Oracle Contact On Demand passes it a set of parameters containing information about the current interaction:

- For a Web page, Oracle Contact On Demand passes the parameters in the URL string.
- For a Win32 application, Oracle Contact On Demand passes the parameters as command line arguments.

[Table E-2](#) provides a list of parameters that are available to pass to an external application.

Table E-2 Parameters Passed to Win32 Applications

Parameter	Description
-a	<p>This parameter contains the ID of the agent making the call (for these calls only):</p> <ul style="list-style-type: none"> ■ Inbound calls ■ Outbound calls to company extension ■ Direct outbound calls to external numbers ■ Preview calls <p>This parameter contains the Inbound Caller ID (for these calls only):</p> <ul style="list-style-type: none"> ■ ACD ■ Direct Inbound
-d	<p>This parameter contains the ID of the agent making the call (for these calls only):</p> <ul style="list-style-type: none"> ■ Inbound calls ■ Outbound calls to company extensions <p>This parameter contains the number that the agent called (for these calls only):</p> <ul style="list-style-type: none"> ■ Direct outbound calls to external numbers ■ Preview calls <p>This parameter contains the project phone number (for these calls only); that is, ACD calls. This parameter contains the number that the customer called (for these calls only); that is, Direct Inbound.</p>

Table E-2 (Cont.) Parameters Passed to Win32 Applications

Parameter	Description
-p	The ProjectId. Oracle Contact On Demand finds the project name from the Projects Table. For more information on company tables in the Oracle Contact On Demand database, see "Providing Custom Web Applications Access to Company Database Tables" on page 5-15.
-s	The Script Id. Oracle Contact On Demand finds the script name from the LibraryURL table. For more information on company tables in the Oracle Contact On Demand database, see "Providing Custom Web Applications Access to Company Database Tables" on page 5-15.
-q	The FAQ Id. Oracle Contact On Demand finds the FAQ name from the LibraryURL table. For more information on company tables in the Oracle Contact On Demand database, see "Providing Custom Web Applications Access to Company Database Tables" on page 5-15.
-i	The interaction ID.
-t	An integer representing the interaction type ID. For more information on the interaction types, see Table E-4 .
-b	The session ID on the Web Server.
-u	The agent's user ID. Oracle Contact On Demand finds the script name in the Users Table. For more information on company tables in the Oracle Contact On Demand database, see "Providing Custom Web Applications Access to Company Database Tables" on page 5-15.

[Table E-3](#) provides descriptions of the interaction states.

Table E-3 Interaction States

Interaction State ID	Description
2209	INTERACTION_INCOMING An inbound interaction.
2210	INTERACTION_HOLD An interaction on hold.
2211	INTERACTION_VOICEMAIL A voice mail 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 E-4](#) provides descriptions of the interaction types.

Table E-4 Interaction Types

Interaction Type ID	Description
2001	NEW_INBOUND_CALL
2002	NEW_OUTBOUND_CALL
2005	NEW_INBOUND_EXTENSION

Table E-4 (Cont.) Interaction Types

Interaction Type ID	Description
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
2024	NEW_OUTBOUND_EMAIL
2033	NOTE
3007	NEW_PREVIEW_CALL
3340	NEW_DIRECT_CHAT
3341	DIRECT_CHAT_SEND_MESSAGE

Web Parameters Passed for Chat and Web Callback

The parameters in [Table E-5](#) are passed to all Web pages, but they might be empty unless the interaction is a chat session or a Web callback.

Table E-5 Parameters Passed for Chat and Web Callbacks

Parameter	Description
requestTime	The time requested by the customer for the callback. (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 contact's ID.
offset	The time zone offset from GMT.
queueTime	The amount of time that the customer has been in the queue.
countryCode	The country code the customer selected for the callback phone number.
timezone	The time zone of the person who requested the Web callback.
rescheduleTime	The time the callback has been rescheduled.
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.
companyName	The company name that the customer entered in the Web callback page or the Chat Request page.

Table E-5 (Cont.) Parameters Passed for Chat and Web Callbacks

Parameter	Description
phoneNumber	Phone number that the customer entered in the Web callback page or Chat Request page.
countryCode	If the current interaction is preview, this parameter has the value from the country code column in the dialer list.

Integrating Oracle Contact On Demand with Oracle CRM On Demand

This appendix describes how to integrate Oracle Contact On Demand with Oracle CRM On Demand. It includes the following topics:

- [About the Integration Between Oracle Contact On Demand and Oracle CRM On Demand](#)
- [About the Agent Workflow for Inbound Interactions](#)
- [About the Message Flow Between Oracle Contact On Demand and Oracle CRM On Demand](#)
- [About Oracle CRM On Demand Parameters and Definitions](#)
- [Roadmap for Configuring the Integration between Oracle Contact On Demand and Oracle CRM On Demand](#)
- [Troubleshooting the Oracle Contact On Demand and Oracle CRM On Demand Integration](#)

About the Integration Between Oracle Contact On Demand and Oracle CRM On Demand

You can configure Oracle Contact On Demand to integrate with Oracle CRM On Demand. The integration between them provides for the display of CRM On Demand data within Interaction Manager. The integration is configured at the company level. When a company is configured for integration, Oracle Contact On Demand provides the interaction control, telephony management, and presentation of the CRM On Demand data that is displayed and is made available for agents to act upon in Interaction Manager.

The integration involves configuring the following criteria:

- Create Activity
- Screen Pop
- End Interaction

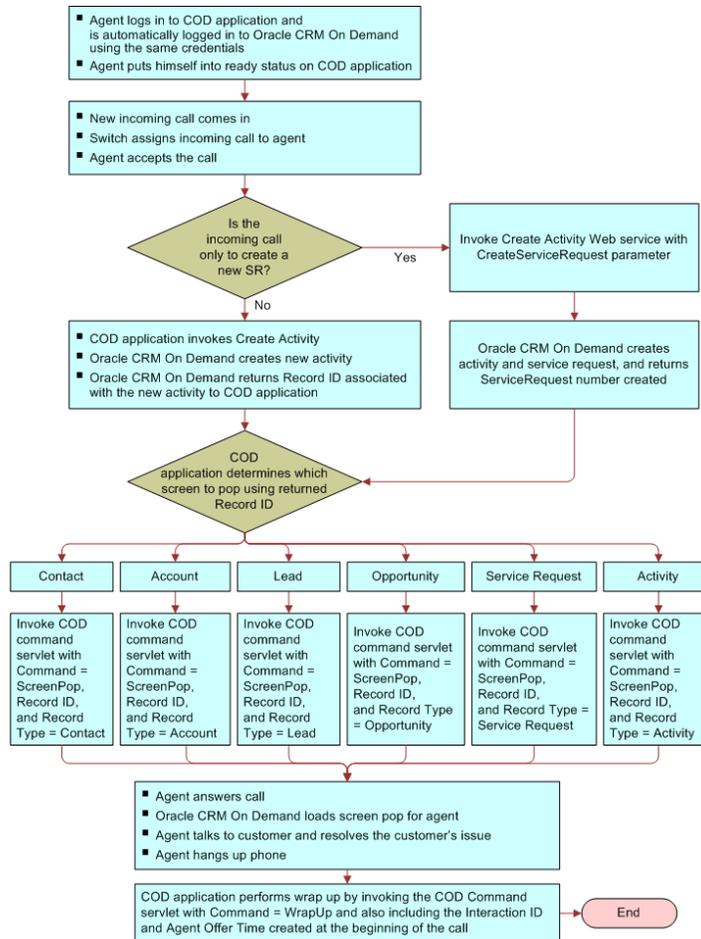
When an interaction arrives in the contact center, and the agent accepts the interaction, Oracle CRM On Demand creates an activity using the activity related content. Through the configuration of Oracle Contact On Demand and the integration with Oracle CRM On Demand, the activity record displays in what is commonly referred to as a screen pop. During the interaction, the agent can navigate within Oracle CRM On Demand to find relevant information pertaining to the interaction and perform related activities.

Note: When configuring the integration between Oracle Contact On Demand and Oracle CRM On Demand, it is important to note that username and passwords must match in both instances to ensure password validation and authentication in the integrated environment.

About the Agent Workflow for Inbound Interactions

Figure F-1, "Agent Workflow for Inbound Interactions" illustrates the agent workflow and the operations performed by Oracle Contact On Demand and Oracle CRM On Demand for an inbound interaction.

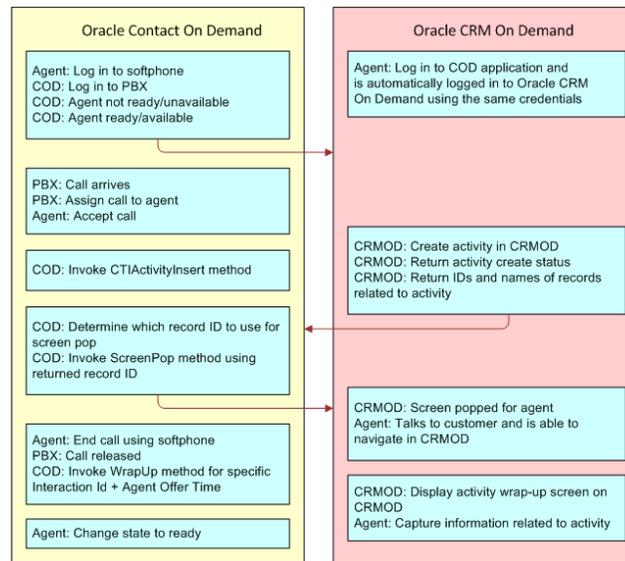
Figure F-1 Agent Workflow for Inbound Interactions



About the Message Flow Between Oracle Contact On Demand and Oracle CRM On Demand

Figure F–2, "Message Workflow for Inbound Interactions" illustrates the message workflow and the operations performed by Oracle Contact On Demand and Oracle CRM On Demand for an inbound interaction.

Figure F–2 Message Workflow for Inbound Interactions



About Oracle CRM On Demand Parameters and Definitions

Each time Oracle Contact On Demand receives a new interaction, it controls the display and handling of the interaction for all enabled media types in Oracle CRM On Demand as defined by the parameters in the CRMOD Integration Libraries.

The Webpage Dialog screen in the CRMOD Integration Libraries option is used to define the parameters for customization of object creation and screen navigation. Each parameter contains the following elements:

- **Parameter Name.** The name for the Web service or servlet as defined by the Integration API.
- **Location.** Identifies the data from where it will be retrieved in Oracle CRM On Demand and passed to the Web service call or servlet invocation. There are four locations:
 - Interaction - Data automatically attached to the interaction through known variables.
 - Custom - Data attached to the interaction in fields which are not predefined such as IVR, Chat, or Web Callback variables.
 - Static - Static string variables that have a literal value defined directly within the configuration dialog.

- Parameter location - Data attached to the interaction in fields defined in parameter extension libraries.
- Activity - Data attached to the result of Create Activity Web service call.
- **Value.** The COD value to be sent for the corresponding service or servlet parameter value. This value will be retrieved from the defined location.
- **Mapping.** The mapping dictates how data coming from Oracle Contact On Demand should be altered before being used in a service call to Oracle CRM On Demand.

Oracle CRM On Demand Integration Libraries and Screen Pop Configuration

Oracle CRM On Demand integration libraries allow for the configuration of parameters and the customization of object creation and screen navigation. These parameters are used to define the integration behavior for inbound interactions for the related project and all enabled media types. These parameters are used to establish the behavior, handling, and display of CRM On Demand Web services and Servlet APIs.

Each library is comprised of three areas:

- **Create Activity.** Determines what parameters and values will be sent with the Web service call for creating an activity.
- **Screen Pop.** (Optional) Preferred screen to be presented in relevant priority based on availability of the object in CRMOD. This area contains a list of screen pop actions that can be taken in order of preference based on availability. The integration will present to the agent (screen pop by calling Servlet APIs) the first screen that has an associated record ID returned from the previous Create Activity service call.
- **End Interaction.** (Optional) Represents the screen pop that is presented to agents by calling Servlet APIs for interaction wrap-up.

Create Activity Parameters, Locations, Values, and Mappings

Table F-1 lists the CRMOD APIs that are available for the Create Activity parameters.

Note: The naming convention of the Create Activity parameters differ between Oracle Contact On Demand and Oracle CRM On Demand. The first letter of the parameters in Oracle Contact On Demand are lower-case, for example, *channelType*. While the first letter of the parameter in Oracle CRM On Demand is upper-case. For example, *ChannelType*.

Table F-1 Create Activity Parameters

Parameter	Description
InteractionData.channelType	The channel type is equivalent to the activity subtype. Note: Definition of the InteractionData.channelType parameter is required.
InteractionData.interactionId	Part of the primary key of the activity, together with AgentOfferTime parameter. Note: Definition of the InteractionData.interactionIdType parameter is required.

Table F-1 (Cont.) Create Activity Parameters

Parameter	Description
InteractionData.agentOfferTime	<p>The time that the interaction is offered to an agent (also known as System Offer Time).</p> <p>The AgentOfferTime parameter is also used as a primary key for differentiating activity records with the same InteractionId. This value originates from Oracle Contact On Demand.</p> <p>Note: Definition of the InteractionData.agentOfferTime parameter is required.</p>
InteractionData.createServiceRequest	<p>For activity creation only, whether a service request (SR) should be created and associated with the newly created activity.</p> <p>The associated account and contact of the activity will be associated with this SR. If ServiceRequestNumber is specified or AssociatedRecordType is Service Request, CreateServiceRequest is ignored.</p>
InteractionData.origin	<p>For calls and voice mails only, the phone number of the person originating the call, that is, the caller ID or automatic number identification (ANI) number. The country code must be appended to the start of the value.</p> <p>For email activities only, the From address of the original email.</p> <p>For chat, either a phone number or an email address.</p>
InteractionData.destination	<p>For calls and voice mails only, the number that was dialed to initiate the call. For an incoming call, this is the number that the customer dialed to reach the agent. For an outgoing call, it is the number the agent dialed. The country code must be appended to the start of the value.</p> <p>For email activities only, the address to which the email was sent.</p> <p>For chat, either a phone number or an email address.</p>
InteractionData.priority	<p>The priority level of the activity. The following are the default values, but this list can be modified and expanded through Oracle CRM On Demand configuration.</p> <ul style="list-style-type: none"> • 1-High • 2-Medium • 3-Low <p>Note: Invalid priority values are ignored.</p>
InteractionData.ivrBeginTime	<p>For calls and voice mails only, the time that the call is picked up by the interactive voice response (IVR).</p>
InteractionData.queueBeginTime	<p>For calls and voice mails, this is the time after the user interacts with the IVR at which the call is put into a queue for an agent to pick up.</p> <p>For email activities only, this is the time that the email is retrieved from the POP server and put into a queue.</p>
InteractionData.queue	<p>The queue to which the automatic call distributor (ACD) routed the message.</p>

Table F-1 (Cont.) Create Activity Parameters

Parameter	Description
InteractionData.campaignSourceCode	The source code of an associated campaign record. If the value does not correspond to a record in Oracle CRM On Demand, the activity is still created and no error is returned.
InteractionData.contactPhoneNumber	The home telephone number for the contact associated with the activity. If the value does not correspond to a record in Oracle CRM On Demand, the activity is still created and no error is returned.
InteractionData.serviceRequestNumber	The number of the service request associated with the activity. If the value does not correspond to a record in Oracle CRM On Demand, the activity is still created and no error is returned.

Table F-2 lists the available locations for the Create Activity parameters.

Table F-2 Create Activity Locations

Location	Description
Interaction	Data automatically attached to the interaction through known variables.
Custom	Data attached to the interaction in fields that are not predefined such as IVR, Chat, or Web Callback variables.
Parameter Extension	Data attached to the interaction in fields defined in parameter extension libraries.
Activity	Data attached to the result of the create activity Web service call.
Static	Static string variables that have a literal value defined directly within the configuration dialog.

Table F-3 lists the accepted values for Activity locations.

Table F-3 Values for Activity Location

Value	Description
LeadFullName	The full name of the lead associated with the activity.
ContactId	The ID of the contact record associated with the activity.
CampaignName	The name of the campaign associated with the activity.
AgentOfferTime	The same as for the input argument of the same name. The time that the interaction is offered to an agent. (also known as System Offer Time). It is used like a default value for other parameters, like IVRBeginTime and QueueBeginTime. AgentOfferTime is also used as a primary key for differentiating activity records with the same InteractionId.
ServiceRequestId	The ID of the service request record associated with the activity.
LeadId	The ID of the lead associated with the activity.
OpportunityName	The name of the opportunity associated with the activity.

Table F-3 (Cont.) Values for Activity Location

Value	Description
ServiceRequestNumber	The number of the service request associated with the activity.
AccountId	The ID of the account record associated with the activity.
AccountName	The name of the account record associated with the activity.
CampaignId	The ID of the campaign record associated with the activity.
InteractionId	Part of the primary key of the activity, together with AgentOfferTime parameter.
ActivityId	The ID of the activity created, or that already existed.
OpportunityId	The ID of the opportunity associated with the activity.
ContactFullName	The full name of the contact associated with the activity.
Status	<p>Represents the status of the activity and can be one of the following values:</p> <ul style="list-style-type: none"> ▪ OK. The activity was created successfully. ▪ Activity already exists. An activity was created for this interaction before the request. ▪ Unable to create activity. It was not possible to create the activity. ▪ Error. There is an error. <p>The values are always returned in English, regardless of the user locale. If there is an exception, a fault string is returned, and it can be translated.</p>

[Table F-4](#) lists the accepted values for Interaction locations.

Table F-4 Values for Interaction Location

Value	Description
interactionId	The identifier of the interaction.
companyName	The name of the company in the chat or Web callback page.
contactId	The name of the campaign associated with the activity.
countryCode	The country code of the ANI or DNIS value.
destination	The dialed number.
displayName	The string that is used in the legacy user interface to display the interaction.
displayState	<p>Represents the state of the display. The various states are:</p> <ul style="list-style-type: none"> ▪ Hold ▪ Active ▪ Conference ▪ Outcome ▪ Wrap up
emailAddress	The email address originating from chat or email.
extension	The extension from the chat or Web callback page.
faqId	The identifier of the FAQ from the URL library.
firstName	The first name of the caller from the chat or Web callback.

Table F-4 (Cont.) Values for Interaction Location

Value	Description
localCreationTime	The time, calculated in milliseconds, from which the interaction was created on the client side.
offset	The time zone offset for the Web callback.
offerTimeDuration	The duration of the ring time that the interaction was offered to the agent.
origin	The number from which the call was made.
phoneNumber	The phone number identified by the caller as the number in which to reach them.
priority	The priority given to the interaction from the project, workgroup overflow, or IVR.
projectId	The identifier of the project where the interaction is assigned.
projectName	The name of the project where the interaction is assigned.
queueTime	The duration of time the interaction spent in the queue.
requestTime	The time the caller requested a callback or Web callback.
rescheduleTime	The time in which the callback or Web callback was rescheduled.
startTime	The time from which the interaction began that is calculated in milliseconds.
state	The state of the interaction.
timezone	The string identifier of the time zone for Web callbacks.
to	The destination of the interaction, project, or project phone.
transferId	The identifier for the transfer.
type	The destination of the interaction, project, or project phone.
workgroupId	The identifier of the workgroup for which the interaction is assigned.
workgroupName	The name of the workgroup where the interaction is assigned.
imFirstName	The first name returned from the Simple CRM contact search.
imLastName	The last name returned from the Simple CRM contact search.
imCompanyName	The company name that is returned from the Simple CRM contact search.
imContactId	The identifier for the contact that is returned from the Simple CRM contact search.

[Table F-5](#) lists the available values for Custom locations.

Table F-5 Values for Custom Location

Value	Description
companyId	Identifier of the company the agent belongs.
faqId	The identifier of the FAQ from the URL library.
MCT	The value of the Make Call Trace variable
workgroupId	The identifier of the workgroup for which the interaction is assigned.

Table F–5 (Cont.) Values for Custom Location

Value	Description
ANI	The identifier of the caller, phone, or email.
imLastName	The last name returned from the Single CRM contact search.
agentId	The identifier of the agent.
systemStartTime	The time from which the interaction began that is calculated in milliseconds.
extension	The extension from the chat or Web callback page.
userName	The user name for the agent.
DNIS	The number the caller dialed.
uniqueId	The deprecated identifier for the interaction.
contactId	The name of the campaign associated with the activity.
from	The identifier of the caller, phone, or email.
sessionId	The mail-box identifier of the agent.
imFirstName	The first name returned from the Simple CRM contact search.
offset	The time zone offset for the Web callback.
scriptId	The identifier for the URL library that is assigned to the script.
interactionId	The identifier of the interaction.
timezone	The string identifier of the time zone for Web callbacks.
state	The state of the interaction.
queueTime	The duration of time for which the interaction spent time in the queue.
SYSWGNAME	The workgroup name to which the interaction is assigned.
phoneNumber	The number for callbacks and Web callbacks.
systemOfferTime	The time in milliseconds that the interaction was offered to the agent.
agentLastName	The last name of the agent.
display	The string that is used in the legacy user interface to display the interaction.
countryCode	The country code of the ANI or DNIS value.
systemEmailSubject	The subject of the email.
otherId	The identifier for the contact Id for the next preview record.
requestTime	The time the caller requested a callback or Web callback.
priority	The priority given to the interaction from the project, workgroup overflow, or IVR.
ACD_PRIORITY	The priority assigned to the interaction.
interactionType	Represents the legacy interaction type.
agentCompanyName	The name of the company to which the agent is assigned.
doNotRecord	A flag that indicates that recording of calls should be turned off for the interaction.
companyName	The name of the company in the chat or Web callback page.

Table F-5 (Cont.) Values for Custom Location

Value	Description
lastName	The last name of the caller from the chat or Web callback.
customerId	The identifier that is assigned to the custom in the IVR.
to	The destination of the interaction, project, or project phone.
projectId	The identifier of the project where the interaction is assigned.
email	The email from chat or Web callback.
imCompanyName	The company name that is returned from the Simple CRM contact search.
imContactId	The identifier for the contact that is returned from the Simple CRM contact search.
agentFirstName	The first name of the agent.
systemTransfer	Represents the system handling of the interaction.

Table F-6 describes the replacement strings for the *Interaction* mapping value.

Table F-6 Replacement Strings for Interaction Mapping Value

Contact On Demand Value	CRM On Demand String
1	Inbound Call
13	Outbound Call
9	Preview Call
5	Callback
6	Web Callback
2	Inbound Chat
3	Inbound Email
7	Inbound Voicemail

Table F-7 describes the replacement strings for the *Priority* mapping value.

Table F-7 Replacement Strings for Mapping Value

Contact On Demand Value	CRM On Demand String
1	1-High
2	1-High
3	2-Medium
4	3-Low
5	3-Low

Screen Pop Parameters

Table F-8 lists the accepted Oracle CRM On Demand parameters for configuring screen pops.

To configure dynamic screen pops with attached data, the preconfigured application supports Post methods to pass parameters. To support Get methods to pass parameters, you can edit the URLs to append parameters.

No mappings are defined when creating screen pops.

Table F–8 Screen Pop Parameters

Parameter	Description
ScreenPopRecordId	The record ID of the screen pop record.
ScreenPopRecordType	<p>The suggested record type for the screen pop record. The suggestion is based on the following priority order:</p> <ul style="list-style-type: none"> ▪ Service Request ▪ Campaign ▪ Contact ▪ Lead ▪ Account ▪ Activity <p>For example, if the activity is associated with both a contact and an account, Contact is returned because that record type is higher in the priority list. The suggestion, together with the record associations returned, allows third-party vendors to choose the record type for the screen pop.</p>
ChannelType	<p>The suggested record type for the screen pop record. When specifying the following LOV subtype values, the type value in parentheses is automatically set. The following are the LOV subtype values:</p> <ul style="list-style-type: none"> ▪ Inbound Call (Call) ▪ Outbound Call (Call) ▪ Inbound Transfer (Call) ▪ Outbound Transfer (Call) ▪ Missed Transfer (Call) ▪ Preview Transfer (Call) ▪ Preview Call (Call) ▪ Callback (Callback) ▪ Web Callback (Callback) ▪ Inbound Chat (Chat) ▪ Inbound Email (Email) ▪ Outbound Email (Email) ▪ Forwarded Email (Email) ▪ Reassigned Email (Email) ▪ Email Response (Email) ▪ Inbound Voicemail (Voicemail) ▪ Forwarded Voicemail (Voicemail) ▪ Reassigned Voicemail (Voicemail) <p>Note: Only use this screen pop parameter if the Record Type is configured for Activity.</p>

[Table F–9](#) lists the available locations for configuring screen pops.

Table F–9 Screen Pop Locations

Location	Description
Activity	The data that is attached to the result of the Create Activity Web service call.
Command	The value in this case is <i>ScreenPop</i> .
RecordID	The record ID of the record used for the screen pop.
RecordType	The record type for the screen pop. Possible values are: <ul style="list-style-type: none"> ▪ Service Request ▪ Contact ▪ Account ▪ Lead ▪ Opportunity ▪ Campaign ▪ Activity
Static	The string variable that has a literal value assigned in the configuration dialog. Note: Use this location type to define the Record Type parameter.

[Table F–10](#) lists the accepted values for Activity location when configuring screen pops.

Table F–10 Activity Locations for Screen Pops

Location	Description
LeadFullName	The full name of the lead associated with the activity.
ContactId	The name of the campaign associated with the activity.
CampaignName	The name of the campaign associated with the activity.
AgentOfferTime	The same as for the input argument of the same name. The time that the interaction is offered to an agent. (also known as System Offer Time). It is used like a default value for other parameters, like IVRBeginTime and QueueBeginTime. AgentOfferTime is also used as a primary key for differentiating activity records with the same InteractionId.
ServiceRequestId	The ID of the service request record associated with the activity.
LeadId	The ID of the lead associated with the activity.
OpportunityName	The name of the opportunity associated with the activity.
ServiceRequestNumber	The number of the service request associated with the activity.
AccountId	The ID of the account record associated with the activity.
AccountName	The name of the account record associated with the activity.
CampaignId	The ID of the campaign record associated with the activity.
InteractionId	Part of the primary key of the activity, together with AgentOfferTime parameter.
ActivityId	The ID of the activity created, or that already existed.
OpportunityId	The ID of the opportunity associated with the activity.

Table F–10 (Cont.) Activity Locations for Screen Pops

Location	Description
ContactFullName	The full name of the contact associated with the activity.
Status	<p>Represents the status of the activity and can be one of the following values:</p> <ul style="list-style-type: none"> ■ OK. The activity was created successfully. ■ Activity already exists. An activity was created for this interaction before the request. ■ Unable to create activity. It was not possible to create the activity. ■ Error. There is an error. <p>The values are always returned in English, regardless of the user locale. If there is an exception, a fault string is returned, and it can be translated.</p>

End Interaction or Wrap-Up Parameters

[Table F–11](#) lists the accepted Oracle CRM On Demand parameters that you can use to configure an end interaction or wrap-up screen pop.

No mappings are defined when creating screen pops.

Table F–11 CRMOD End Interaction Parameters

Parameter	Description
AgentOfferTime	The time that the interaction is offered to an agent. It is used as the default value for other parameters, such as IVRBeginTime and QueueBeginTime.
InteractionId	Part of the primary key of the activity and is used together with the AgentOfferTime parameter.

[Table F–12](#) lists the available locations for configuring an end interaction screen pop.

Table F–12 End Interaction Locations

Location	Description
Interaction	The data that is automatically attached to the interaction through the known variables.
Custom	The data that is attached to the interaction that are not predefined, such as IVR, Chat, or Web Callback variables.

Roadmap for Configuring the Integration between Oracle Contact On Demand and Oracle CRM On Demand

To configure the integration between Oracle Contact On Demand and Oracle CRM On Demand, see the following topics:

- ["Creating a Company Package"](#) on page 5-6
- ["Full Feature Company Package for Oracle Contact On Demand"](#) on page 5-2
- ["Creating an CRMOD Integration Library"](#) on page 6-57
- ["Adding or Editing a Project Definition"](#) on page 15-1
- ["Adding or Editing User Accounts"](#) on page 8-3

- ["Configuring Controls and Restrictions for an Agent"](#) on page 8-7
- ["Process of Defining the Call Workflow"](#) on page 13-1
- ["Process of Deploying a Simple Campaign"](#) on page 13-7
- ["About System Variables"](#) on page 14-11
- ["Adding Actions to Nodes"](#) on page 14-1
- [Appendix E, "Parameters Passed to External Applications"](#)
- ["Integrating CRM with the Internet or a Win32 Application"](#) on page 5-17
- ["Configuring CRMOD Web Services and Servlet API's for a CRMOD Integration Library"](#) on page 6-57
- [Appendix C, "Extending Interaction Manager"](#)

Troubleshooting the Oracle Contact On Demand and Oracle CRM On Demand Integration

This topic includes information about identifying and resolving problems that are commonly encountered when COD-CRMOD Integration is enabled.

Troubleshooting Common Errors

The following list describes the most common error messages and the actions that should be taken when these errors are shown on the screen.

[Table F-13](#) lists the common error messages that you can encounter.

Table F-13 Common Errors

Type of Error	Error Message	Cause and Remedy
Invalid Credentials	Error accessing CRM. Please make sure that your Oracle Contact On Demand password matches your CRM password by accessing the Agent Settings.	This error occurs due to the failure of a CRMOD CreateActivity call. COD credentials must match CRMOD credentials. Credentials can be changed from the Configuration settings.
Activity Creation Failure	Activity Creation Failed	An irrecoverable error took place during the activity creation. Possible causes: Web service is not available at the moment, a network error, and so on. When this error occurs, the interaction workspace is set with CRMOD home page. Use CRMOD home page to access features available to create required CRMOD objects.

Table F-13 (Cont.) Common Errors

Type of Error	Error Message	Cause and Remedy
Web Services Operation Allotment Limit Reached	The Web Services Operations Allotment of LIMIT has been reached or there is insufficient capacity remaining to process your request.	CRMOD activity object could not be created because CTIActivityInsert Web service allotment limit is reached or there is no capacity to process the request. When this error occurs, the interaction workspace is set with CRMOD home page. Use CRMOD home page to access features available to create required CRMOD objects.
Missing Mandatory Field	<FIELDNAME> is a required field. Please enter a value for the field	Request to CTIActivityInsert Web service was rejected because required input parameters are missing. Check CRMOD Integration Library associated to the project receiving the interaction. Verify if all required Web service API parameter are defined in the library. AgentOfferTime, ChannelType and InteractionId parameters should be defined.
Invalid Value Type or Format	Invalid value, VALUE, is specified for option OPTION	Request to CTIActivityInsert Web service was rejected because input parameters values don't match expected type or accepted format. Check CRMOD Integration Library associated to the project receiving the interaction. Verify OPTION parameter definition in the library is configured with a valid value.

Using Log Files for Troubleshooting

In order to gather information from log files to be used in troubleshooting in the IC/SM app.crmod.integration and web-renderer plugins must be set to DEBUG logging level.

Log entries can be found in the following log files.

Create Activity Request

This sample log file describes the API parameters that are used in a CTIActivityInsert Web service call.

Example F-1 Create Activity Request

```
2011-07-26 19:17:39,781 DEBUG com.taw.cca.client.app.crmod.PluginController$2
CTIActivityService.ctiActivityInsert()
```

```
CTIActivityInsert.InteractionData.listOfInteraction={[interactionId=40041450720633
, agentOfferTime=1311718612, channelType=Inbound Chat,
origin=jack.smith@oracle.com, destination=jack.smith@oracle.com, priority=1-High,
ivrBeginTime=1311718612, queueBeginTime=1311718612, queue=crmmod wg, ]}
```

Create Activity Result

This sample log file describes the resulting ActivityData returned by CTIActivityInsert Web service call.

Example F–2 Create Activity Result

```
2011-07-26 19:17:48,265 DEBUG com.taw.cca.client.app.crmod.PluginController
CTIActivityService.ctiActivityInsert()
    CTIActivityInsertOutput.listOfActivityData={ [status=OK,
interactionId=40041450720633, agentOfferTime=1311718612, activityId=1QA2-W7RHF,
screenPopRecordId=1QA2-W7RHF, screenPopRecordType=Activity]}
```

Screen Pop Option

This sample log file describes the screen pop option used to start a window from the CRM On Demand Integration library once it is associated with an interaction after the CTIActivityInsert Web service call.

Example F–3 Screen Pop Option

```
2011-07-26 19:17:48,265 DEBUG
com.taw.cca.client.app.crmod.workspaces.interaction.CrmodInteractionComponent
Screenpop option to load for interactionId=40041450720633: [id=17,
crmodBaseUrl=http://slc402444.us.oracle.com, screenPopTypeName=activity(id=17,
type=7 ,option=2), sequence=5,
url=http://slc402444.us.oracle.com/OnDemand/user/CTICommand, serviceName=,
parameters=[id=90, name=Record Type, locationType=3, locationValue=Activity,
mappingLibrary=[name=none, values=[]]]
[id=91, name=Record Id, locationType=4, locationValue=activityId,
mappingLibrary=[name=none, values=[]]]
[id=92, name=Channel Type, locationType=1, locationValue=type,
mappingLibrary=[name=Interaction, values=[[value=1, replacement=Inbound Call],
[value=13, replacement=Outbound Call], [value=2, replacement=Inbound Chat],
[value=3, replacement=Inbound Email], [value=5, replacement=Callback], [value=6,
replacement=Web Callback], [value=7, replacement=Inbound Voicemail], [value=8,
replacement=Predictive Call], [value=9, replacement=Preview Call]]]]]
```

Workspace Screen Pop

This sample log file describes the URL that is used to set the workspace screen pop option.

Example F–4 Workspace Screen Pop

```
2011-07-26 19:17:48,296 DEBUG
com.taw.cca.client.app.common.util.browser.HTMLBrowser Setting url:
http://slc402444.us.oracle.com/OnDemand/user/CTICommand?Command=ScreenPop&Record
Type=Activity&Channel Type=Inbound+Chat&Record Id=1QA2-W7RHF
```

Wrap-Up Screen Pop

This sample log file describes the elements of the screen pop for ending an interaction.

Example F–5 Wrap-Up Screen Pop

```
2011-07-26 19:18:54,375 DEBUG
com.taw.cca.client.app.crmod.workspaces.interaction.CrmodInteractionComponent
Wrapup screenpop for interactionId=40041450720633: [id=18,
crmodBaseUrl=http://slc402444.us.oracle.com, screenPopTypeName=wrapup(id=18,
type=8 ,option=3), sequence=1,
url=http://slc402444.us.oracle.com/OnDemand/user/CTICommand, serviceName=,
```

```

parameters=
  [id=93, name=Interaction Id, locationType=1, locationValue=id,
mappingLibrary=[name=none, values=[]]]
  [id=94, name=Agent Offer Time, locationType=2,
locationValue=systemOfferTime, mappingLibrary=[name=none, values=[]]]

```

Wrap-Up Screen Pop URL

This sample log file describes the URL that is used for screen pops for ending an interaction.

Example F-6 Wrap-Up Screen Pop URL

```

2011-07-26 19:18:54,546 DEBUG
com.taw.cca.client.app.common.util.browser.HTMLBrowser Setting url:
http://slc402444.us.oracle.com/OnDemand/user/CTICommand?Command=WrapUp&Interaction
Id=40041450720633&Agent Offer Time=1311718612

```

Integration Library and Interaction Association

This sample log file describes the association of interactions and the CRM On Demand Integration library.

Example F-7 Integration Library and Interaction Association

```

2011-07-26 19:17:31,703 DEBUG
com.taw.cca.client.app.crmod.workspaces.interaction.CrmodInteractionComponent
Crmod integration library [id=3, name=General Inbound, createActivityEnabled=true,
endInteractionEnabled=true,
  createActivityScreenPop=[id=12, crmodBaseUrl=http://slc402444.us.oracle.com,
screenPopTypeName=createactivity(id=12, type=10 ,option=1), sequence=1,
url=http://slc402444.us.oracle.com/Services/cte/CTIActivityService,
serviceName=ctiActivityInsert,
  parameters=
    [id=70, name=InteractionData.interactionId, locationType=1,
locationValue=id, mappingLibrary=[name=none, values=[]]]
    [id=71, name=InteractionData.agentOfferTime, locationType=2,
locationValue=systemOfferTime, mappingLibrary=[name=none, values=[]]]
    [id=72, name=InteractionData.channelType, locationType=1,
locationValue=type, mappingLibrary=[name=Interaction, values=[[value=1,
replacement=Inbound Call], [value=13, replacement=Outbound Call], [value=2,
replacement=Inbound Chat], [value=3, replacement=Inbound Email], [value=5,
replacement=Callback], [value=6, replacement=Web Callback], [value=7,
replacement=Inbound Voicemail], [value=8, replacement=Predictive Call], [value=9,
replacement=Preview Call]]]]
    [id=73, name=InteractionData.origin, locationType=1, locationValue=origin,
mappingLibrary=[name=none, values=[]]]
    [id=74, name=InteractionData.destination, locationType=1,
locationValue=destination, mappingLibrary=[name=none, values=[]]]
    [id=75, name=InteractionData.priority, locationType=1,
locationValue=priority, mappingLibrary=[name=Priority, values=[[value=1,
replacement=1-High], [value=2, replacement=1-High], [value=3,
replacement=2-Medium], [value=4, replacement=3-Low], [value=5,
replacement=3-Low]]]]
    [id=76, name=InteractionData.ivrBeginTime, locationType=2,
locationValue=systemStartTime, mappingLibrary=[name=none, values=[]]]
    [id=77, name=InteractionData.queueBeginTime, locationType=2,
locationValue=queueBeginTime, mappingLibrary=[name=none, values=[]]]
    [id=78, name=InteractionData.queue, locationType=1,
locationValue=workgroupName, mappingLibrary=[name=none, values=[]]]
    [id=79, name=InteractionData.campaignSourceCode, locationType=2,

```

```

locationValue=CMPID, mappingLibrary=[name=none, values=[]]
  [id=80, name=InteractionData.contactPhoneNumber, locationType=2, ,
locationValue=CHPO, mappingLibrary=[name=none, values=[]]
  [id=81, name=InteractionData.serviceRequestNumber, locationType=2,
locationValue=SRNO, mappingLibrary=[name=none, values=[]]],
  endInteractionScreenPop=[id=18, crmodBaseUrl=http://slc402444.us.oracle.com,
screenPopTypeName=wrapup(id=18, type=8 ,option=3), sequence=1,
url=http://slc402444.us.oracle.com/OnDemand/user/CTICommand, serviceName=,
  parameters=
    [id=93, name=Interaction Id, locationType=1, locationValue=id,
mappingLibrary=[name=none, values=[]]
    [id=94, name=Agent Offer Time, locationType=2,
locationValue=systemOfferTime, mappingLibrary=[name=none, values=[]]],
  defaultScreenPop=[id=17, crmodBaseUrl=http://slc402444.us.oracle.com,
screenPopTypeName=activity(id=17, type=7 ,option=2), sequence=5,
url=http://slc402444.us.oracle.com/OnDemand/user/CTICommand, serviceName=,
  parameters=
    [id=90, name=Record Type, locationType=3, locationValue=Activity,
mappingLibrary=[name=none, values=[]]
    [id=91, name=Record Id, locationType=4, locationValue=activityId,
mappingLibrary=[name=none, values=[]]
    [id=92, name=Channel Type, locationType=1, locationValue=type,
mappingLibrary=[name=Interaction, values=[[value=1, replacement=Inbound Call],
[value=13, replacement=Outbound Call], [value=2, replacement=Inbound Chat],
[value=3, replacement=Inbound Email], [value=5, replacement=Callback], [value=6,
replacement=Web Callback], [value=7, replacement=Inbound Voicemail], [value=8,
replacement=Predictive Call], [value=9, replacement=Preview Call]]]],
  screenPopsOptions=
    [id=13, crmodBaseUrl=http://slc402444.us.oracle.com,
screenPopTypeName=contact(id=13, type=2 ,option=2), sequence=1,
url=http://slc402444.us.oracle.com/OnDemand/user/CTICommand, serviceName=,
  parameters=
    [id=82, name=Record Type, locationType=3, locationValue=Contact,
mappingLibrary=[name=none, values=[]]
    [id=83, name=Record Id, locationType=4, locationValue=contactId,
mappingLibrary=[name=none, values=[]]]
    [id=14, crmodBaseUrl=http://slc402444.us.oracle.com,
screenPopTypeName=lead(id=14, type=4 ,option=2), sequence=2,
url=http://slc402444.us.oracle.com/OnDemand/user/CTICommand, serviceName=,
  parameters=
    [id=84, name=Record Type, locationType=3, locationValue=Lead,
mappingLibrary=[name=none, values=[]]
    [id=85, name=Record ID, locationType=4, locationValue=leadId,
mappingLibrary=[name=none, values=[]]]
    [id=15, crmodBaseUrl=http://slc402444.us.oracle.com,
screenPopTypeName=account(id=15, type=3 ,option=2), sequence=3,
url=http://slc402444.us.oracle.com/OnDemand/user/CTICommand, serviceName=,
  parameters=
    [id=86, name=Record Type, locationType=3, locationValue=Account,
mappingLibrary=[name=none, values=[]]
    [id=87, name=Record Id, locationType=4, locationValue=accountId,
mappingLibrary=[name=none, values=[]]]
    [id=16, crmodBaseUrl=http://slc402444.us.oracle.com,
screenPopTypeName=campaign(id=16, type=6 ,option=2), sequence=4,
url=http://slc402444.us.oracle.com/OnDemand/user/CTICommand, serviceName=,
  parameters=
    [id=88, name=Record Type, locationType=3, locationValue=Campaign,
mappingLibrary=[name=none, values=[]]
    [id=89, name=Record Id, locationType=4, locationValue=campaignId,
mappingLibrary=[name=none, values=[]]]]

```

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