BLUELEAP MEDIA BAR

v18 to v24 Upgrade Guide

Sep 2018 v1

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1 INTRODUCTION

1.1 PURPOSE

The purpose of this document is to detail the v18 to v24 upgrade enhancements & changes.

1.2 CHANGES SUMMARY

1) New look Media Bar
2) Customer Logo support
3) Media Bar Report Icons
4) Multi environment support
5) Updated & versioned PHP handlers
6) Updated Workspaces
7) New enhanced SMS History tab and supporting reports
8) Supports auto incident creation on incoming CTI calls (via user-configuration setting)
9) Supports full control of feature visibility on the Media Bar, Send SMS, and Create Campaign dialogs (which buttons display etc)
10) New Single Send SMS button Addin
11) New Send from Report SMS Addin
12) Templates feature for standard texts
13) Full Opt-Out / Opt-In support for user-configurable 'soft' keywords and custom messages
14) Optional user-configurable creation of incidents for inbound (SMS replies) &/or outbound (sent SMS), with supporting user-configurable workflow
15) User-configurable automatic Prefix &/or Suffix
16) Updated, enhanced & streamlined set of Standard Reports and Dashboards

2 NEW LOOK MEDIA BAR

Enhances & streamlined with more features.

3 CUSTOMER LOGO SUPPORT

VU logo already setup (this is a BL setting)

4 MEDIA BAR REPORT ICONS

User configurable icons for easy access to key reports

Several icons are reserved on the Media Bar for quick access to reports. By default, they are turned off (set to zero) but can be set to any report with a corresponding hint.

#	Icon	Parameter	Default	Recommended
1		AnswersReportID	0	Send SMS from Report report ID
2		AnswersReportText		"Send SMS from Report"
3		DashboardReportID	0	Campaigns report ID
4		DashboardReportText		"SMS Campaigns"
5		MyInboxReportID	0	SMS Replies report ID
6		MyInboxReportText		"SMS Replies"
7		MyIncidentReportID	0	BLMessageTemplate report ID
8		MyIncidentReportText		"Message Templates"
9		ProcessCallReportID	0	Voice Calls by Agent report ID
10		ProcessCallReportIText		"Voice Calls by Agent"

5 MULTI ENVIRONMENT SUPPORT

5.1 NEW ACCOUNT RECORD

The new account record has a special field CUSTOMERDOMAIN that needs to be setup with the source environment URL (with no prefix) – this allows Dialogue to send replies to the correct environment (TST, TST1, QAS, PROD, etc):

5.2 REMOVING OLD FIELDS

Old (retired) account fields will need to be removed when the new objects are merged to existing. This is mainly because they have been moved to the server and will be accessed via the new portal when that comes online.

6 UPDATED & VERSIONED PHP HANDLERS

Handler names shortened & versioned (e.g. BLCampaign24_7) to allow easier upgrades.

- Also see install guide.

7   UPDATED WORKSPACES

Main one is account, several have changed and should be renamed/replaced:

v18.3 Workspaces	v24+
BLAccountWS	Updated
BLCampaignsWS	suffix change for clarity
BLContactTemplateWS	Updated
BLInboundMessageWS	Updated
BLInteractionLogWS	Updated
BLMessageTemplateWS	New
BLOutboundMessageWS	suffix change for clarity

8   NEW SMS HISTORY TAB

Simplified with more info. Once setup it should look something like this:

9   NEW AUTO INCIDENT CREATION ON INCOMING CTI CALLS

Setting **AutoOpenIncidentForIncomingPhoneCall** to True for Media Bar Addin Opens an incident for incoming CTI phone calls, among other wonderous things.
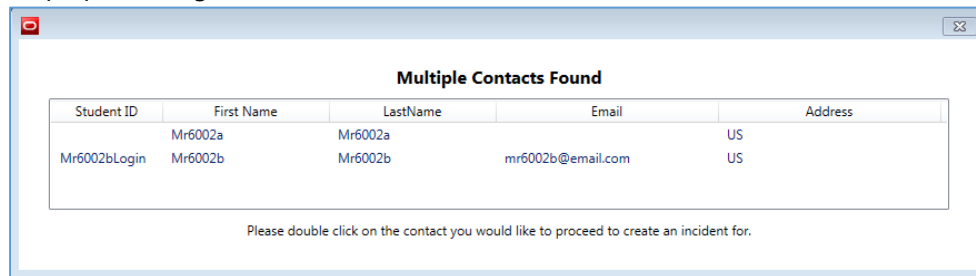
9.1   NO MATCH
- Creates new contact populated with phone number, then

- Creates incident with phone number and assigned field populated with logged in user

9.2 MULTIPLE MATCHES

- Displays a dialog with matches, desired contact is selected with double click:

Multiple Contacts Found

Student ID	First Name	LastName	Email	Address
	Mr6002a	Mr6002a		US
Mr6002bLogin	Mr6002b	Mr6002b	mr6002b@email.com	US

Please double click on the contact you would like to proceed to create an incident for.

- Creates incident with phone number and assigned field populated with logged in user
- (no contact record displayed)

9.3 SINGLE MATCH

- Creates incident with phone number and assigned field populated with logged in user
- (no contact record displayed)

10 FEATURE VISIBILITY (WHICH BUTTONS DISPLAY ETC)

These radio buttons control feature visibility on the Media Bar, Send SMS, and Create Campaign dialogs.

1   Generally, they are all visible (checked) as per below:

Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowAgentExtension	✓
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowAgentStateButton	✓
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowAgentText	✓
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowAssocContactButton	✓
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowCampaignButtons	✓
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowConnectDisconnectButton	✓
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowDialPadButton	✓
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowPersonalization	✓
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	showSMSButtonNew	✓
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowTemplates	✓
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowUnAssocContactButton	✓
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowWebRTCButton	✓

Some scenarios for unchecking are:

2   Not showing advanced SMS features for some users - have a very simple SMS dialog on a profile:

Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowAgentExtension	☑
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowAgentStateButton	☑
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowAgentText	☑
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowAssocContactButton	☑
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowCampaignButtons	☑
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowConnectDisconnectButton	☑
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowDialPadButton	☑
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowPersonalization	☐
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	showSMSButtonNew	☑
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowTemplates	☐
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowUnAssocContactButton	☑
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowWebRTCButton	☑

3   Not showing CTI features on a profile:

Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowAgentExtension	☐
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowAgentStateButton	☐
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowAgentText	☐
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowAssocContactButton	☐
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowCampaignButtons	☑
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowConnectDisconnectButton	☐
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowDialPadButton	☑
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowPersonalization	☑
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	showSMSButtonNew	☑
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowTemplates	☑
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowUnAssocContactButton	☐
Oracle.RightNow.Cti.AddIn.MediaBarAddIn	ShowWebRTCButton	☑

Not showing WebRTC button on a profile, etc:

11 NEW SINGLE SEND SMS BUTTON ADDIN

11.1 BLUELEAPADDINS_V1.ZIP

This enables the 'Single Send SMS Button Addin' that can be added to any workspace. It has the same functionality as the 'Send SMS' button from the Media Bar.

It has one config parameter to show template function or not:

To add simply select from control dropdown on any workspace:
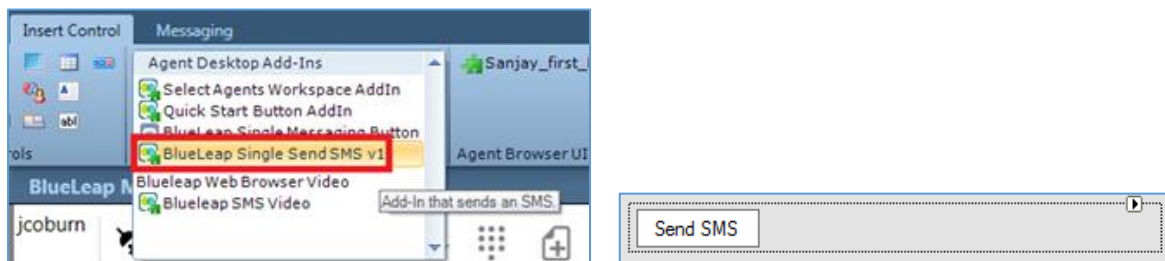
12 NEW SEND FROM REPORT SMS ADDIN

12.1 BLUELEAP_SMS_REPORTADDIN.ZIP

BlueLeap report add-in can be inserted in to any report once the add-in is loaded. It has the same functionality as the 'Send SMS' button from the Media Bar.

Note: A standard supplied report 'Send SMS from Report' is already set up this way.

1) The report must have 1st column as **Contact ID** and 2nd Column as **Mobile Number.**
2) Go to Ribbon and in the **Home tab,** under **Properties** section, click on **Records** button ...In the popup window, expand the respective Object tree view and select the checkbox of Add-In and click on **OK** button.
3) You should see the Hyperlink **SMS AddIn**
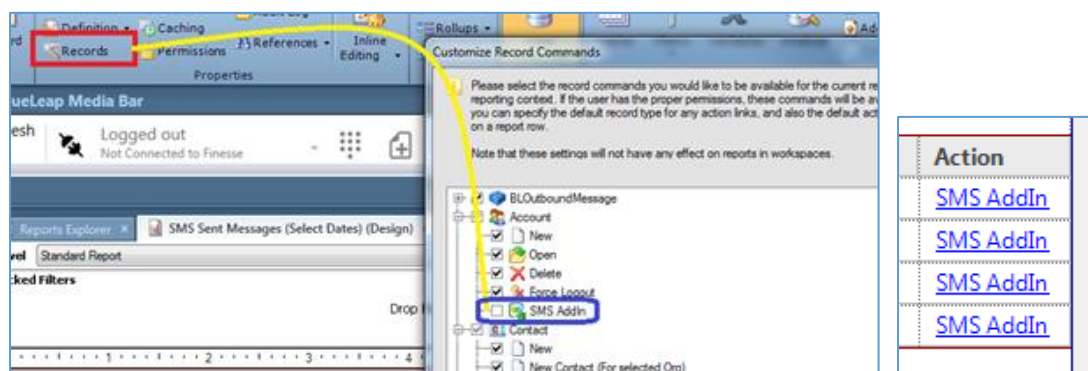
13 TEMPLATES FEATURE FOR STANDARD TEXTS

Standard templates for often used SMS, or Standard Responses can be easily stored & modified.

Just click Save to be prompted to save current message as a template:
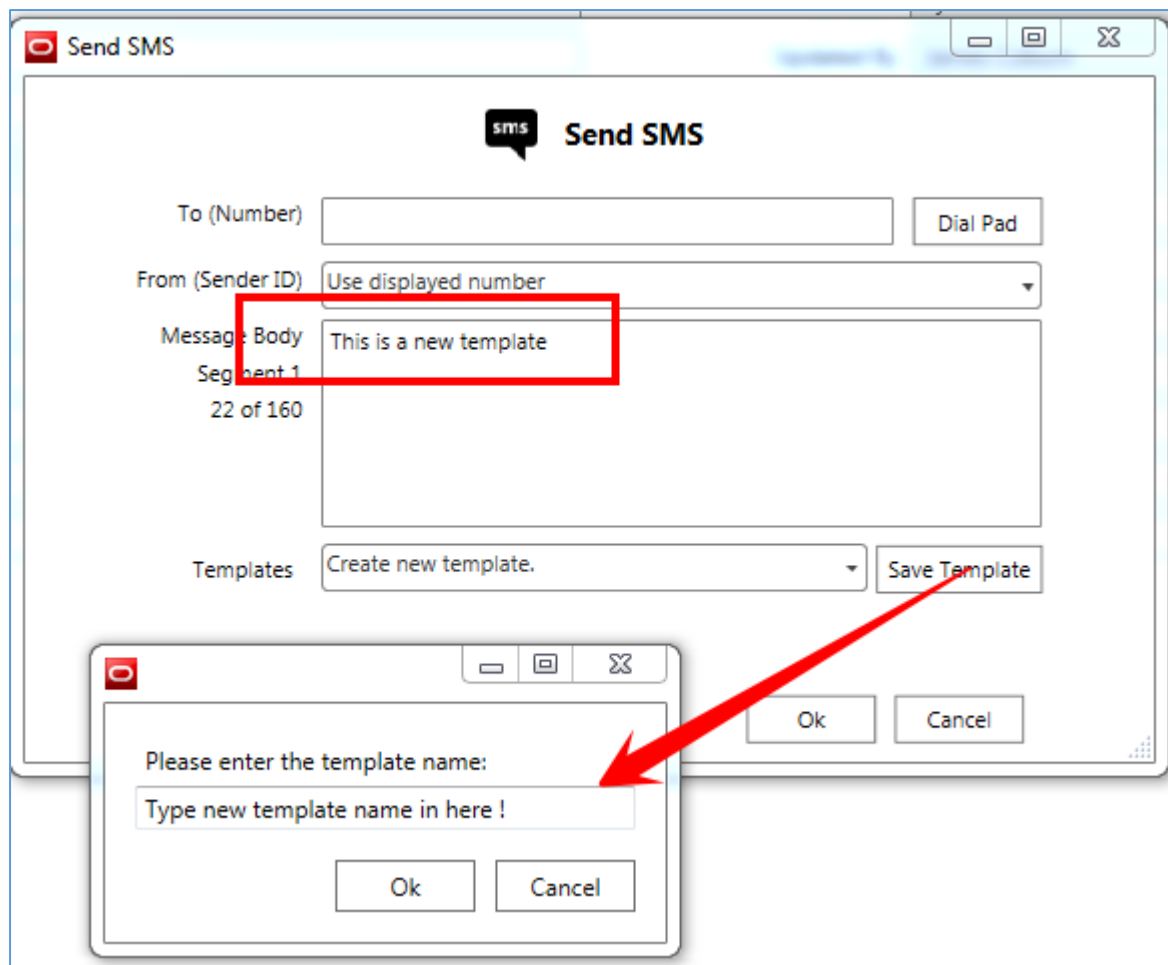
It is then stored and accessible for the future:
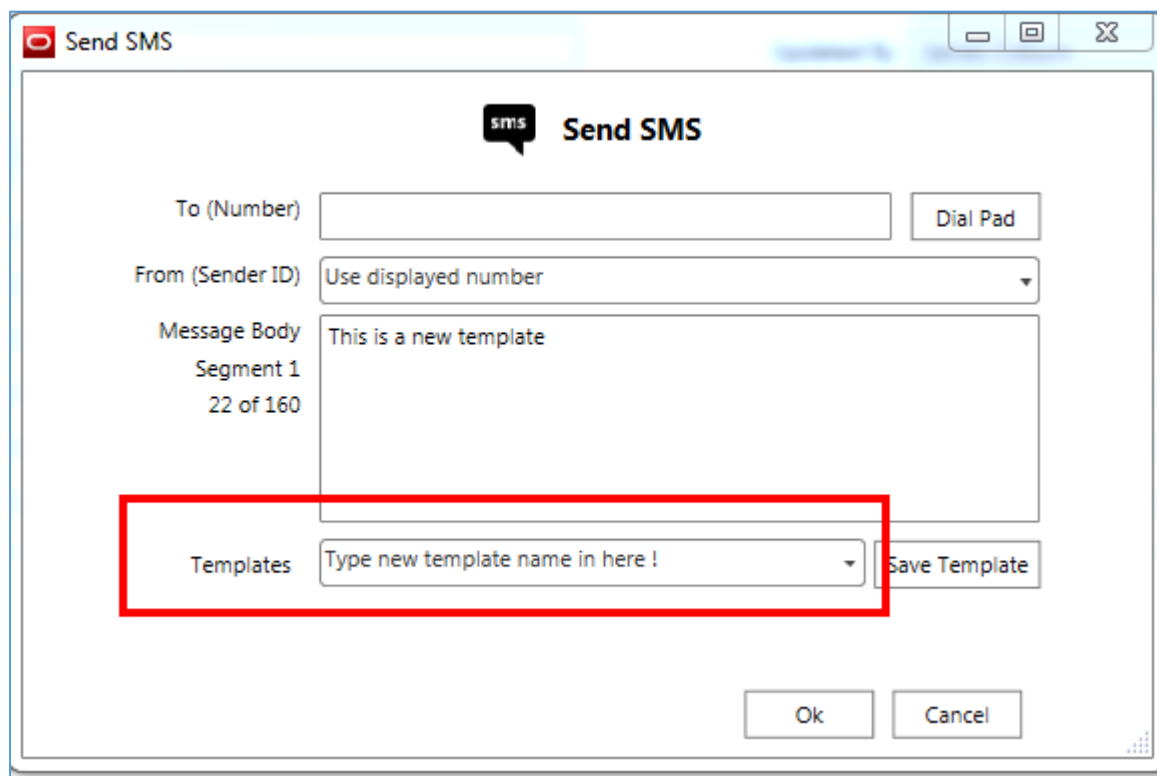
To edit templates, use the Message Template report (commonly setup as a Media Bar icon)
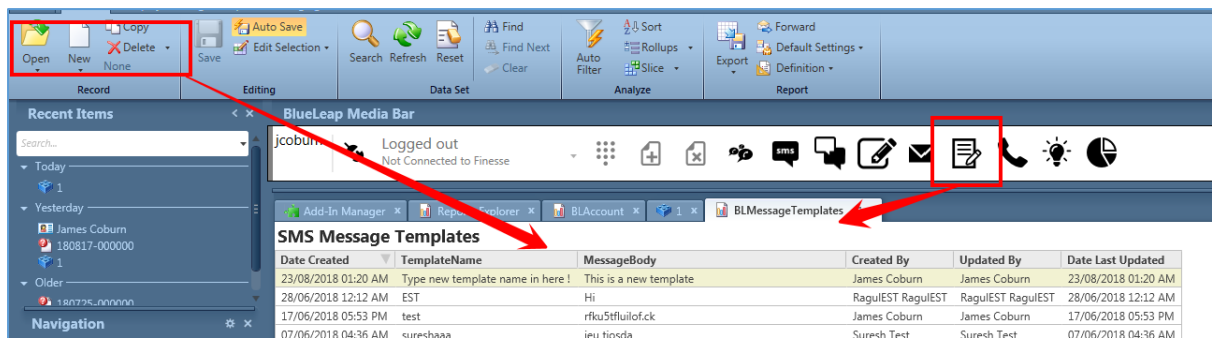
You can edit from ribbon or double click to open workpsace:

Templates can also be disabled by using the visibility feature (by why you would want to?)

14 OPT-OUT / OPT-IN SUPPORT FOR 'SOFT' KEYWORDS

To setup 'soft' OPT-OUT / OPT-IN keywords access the new account workspace.

The account record can be established by running the BLAccount report then adding a new record which will bring up the BLAccount workspace (if the profile has been setup for access).

In the above example:

1) When incoming SMS contains 'OUT' the contacts.BLDialogue$sms_opt_out flag is set to Yes
2) An SMS with 'You're out :-(!' is sent to the sender
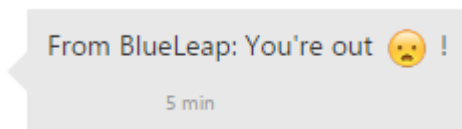
3) When incoming SMS contains 'IN' the contacts.BLDialogue$sms_opt_out flag is set to No
4) An SMS with 'You're in :-) !' is sent to the sender
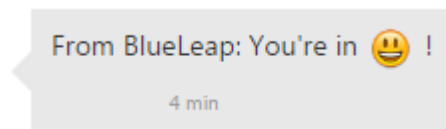
15 INCIDENTS FOR SMS & WORKFLOW

You can setup to create incidents in an incident queue for inbound SMS, and also for outbound SMS (although most just use for inbound to ensure they are responded to in a timely manner) via the new account workspace.

The account record can be established by running the BLAccount report then adding a new record which will bring up the BLAccount workspace (if the profile has been setup for access).

In the above example:

1) Drop down SMSIncidentInbound is set to 'Yes' which enables the feature (default is No)
2) SMSIncidentInboundQueue defines the Incident Queue (queue must be setup separately or pre-existing). Here is it 'SMS Replies' but can be anything.
3) SMSIncidentInboundStatus sets the status text for the incident. Here it is 'Updated'.

4) SMSIncidentInboundSubject sets the subject of the incident. Here it is 'Response to SMS'.
5) Similar applies for SMSIncidentOutbound .

	Queue		Earliest Due		Num. Incidents	Action
1	No Value		01/27/2011 08:57 AM		119	Open , Delete , Print
2	SMS Response		07/03/2018 03:45 PM		2	Open , Delete , Print

Top Level > SMS Response

	Subject	Date Due	Assigned	Status	Action
1	Response to SMS	07/03/2018 03:45 PM		New	Open , Delete , Print
2	Response to SMS	07/04/2018 03:00 PM		New	Open , Delete , Print

If there is an existing incident, then the thread is updated.

16 AUTOMATIC PREFIX &/OR SUFFIX

Automatic prefix &/or suffix can be enabled via the new account workspace.

The account record can be established by running the BLAccount report then adding a new record which will bring up the BLAccount workspace (if the profile has been setup for access).

BLAccount Settings

BLAccountSID	
BLAccountPWD	
BLAccountURL	
CustomerDomain	

ID	1
BLToken	eyJhbGciOiJIUzI1NiIsImIhdCI6MTUzNTAwNDYzNywiZXhwIjoxNTM1MDA1MjM3fQ.eyJ1
Updated By	James Coburn
Date Last Updated	22/08/2018 11:10 PM

SMS Settings

SMSMessagePrefix	From BlueLeap:
SMSIncidentOutbound	No
SMSIncidentOutboundQueue	
SMSIncidentOutboundStatus	
SMSIncidentOutboundSubject	
SMSOptOutKeyword	
SMSOptOutMsg	

SMSMessageSuffix	Reply OUT to opt out
SMSIncidentInbound	No
SMSIncidentInboundQueue	
SMSIncidentInboundStatus	
SMSIncidentInboundSubject	
SMSOptInKeyword	
SMSOptInMsg	

In the above example:

1) SMSMessagePrefix is set to 'From BlueLeap:'
2) SMSMessageSuffix is set to 'Reply OUT to opt out'

NOTE: This can be set independently so you can just have a suffix without a prefix.

From BlueLeap: test1 Reply OUT to opt out

Aug 22 10:55pm

17 UPDATED REPORTS AND DASHBOARDS

Most reports have been updated, enhanced &/or streamlined. Many report variations have been 'Retired'.

- The 'Retired' reports can be retained if required, but BlueLeap recommend deleting them.
- The new/updated reports have all the functionality so deleting will reduce clutter and speed installation times.

Folder	v18.3 Report	v24+
BLCampaigns	Campaigns (Select Dates)	UPDATED
	Campaign Dashboard	UPDATED

	Campaign Dashboard A	NEW
	Campaign Dashboard B	NEW
	Campaign Dashboard C	NEW
	~~Campaign Dashboard Header~~	RETIRED
	~~Campaign Dashboard Body~~	RETIRED
	~~Campaign Dashboard Opt Out~~	RETIRED
	~~Campaign Dashboard Opt Out Header~~	RETIRED
	~~Campaign Dashboard Queued~~	RETIRED
	~~Campaign Dashboard Queued Header~~	RETIRED
	~~Campaign Dashboard Received~~	RETIRED
	~~Campaign Dashboard Received Header~~	RETIRED
	~~Campaign Dashboard Send Failures~~	RETIRED
	~~Campaign Dashboard Send Failures Header~~	RETIRED
	~~Campaign Dashboard Sent~~	RETIRED
	~~Campaign Dashboard Sent Header~~	RETIRED
BLDialogue	BLAccount	UPDATED
	BLCampaigns	no change
	BLContactInboundSMS	UPDATED
	BLContactListSearchByID	no change
	BLContactOutboundSMS	UPDATED
	BLInboundMessage	UPDATED
	BLManageCampaigns	no change
	BLMessageTemplates	NEW
	BLOutboundMessage	UPDATED
BLMessage	Send SMS from Report	NEW
	~~Campaigns Last 7 Days~~	RETIRED
	~~Campaigns Last Month~~	RETIRED
	~~Campaigns Scheduled~~	RETIRED
	Contact Lists Used (Select Dates)	UPDATED
	Contacts Opted Out	UPDATED
	SMS Replies (Select Dates)	NEW
	SMS Sent (Select Dates)	NEW
	~~SMS Queued Messages (Select Dates)~~	RETIRED
	~~SMS Replies Received Last 7 Days (All)~~	RETIRED
	~~SMS Replies Received Last 7 Days (Campaigns)~~	RETIRED
	~~SMS Replies Received Last 7 Days (SMS)~~	RETIRED
	~~SMS Replies Received Last Month (All)~~	RETIRED
	~~SMS Replies Received Last Month (Campaigns)~~	RETIRED
	~~SMS Replies Received Last Month (SMS)~~	RETIRED
	~~SMS Send Failures Last Month (All)~~	RETIRED
	~~SMS Sent Messages (Select Dates)~~	RETIRED
	~~SMS Unsolicited Received Messages (Select Dates)~~	RETIRED
	~~SMS Unsolicited Sent Messages (Select Dates)~~	RETIRED

BLCTI	BlueLeapSearch_VU	UPDATED
	BlueLeapSearch_STD	NEW
	InteractionLog	UPDATED
BLVoice	Voice Calls (Select Dates & Call Source)	UPDATED
	Voice Calls by Agent (Select Dates & Call Source)	UPDATED
	~~Voice Calls Last 7 Days~~	RETIRED
	~~Voice Calls Last 7 Days by Agent~~	RETIRED
	~~Voice Calls Last Month~~	RETIRED
	~~Voice Calls Last Month by Agent~~	RETIRED