BLUELEAP MEDIA BAR

Install & Upgrade Guide

Sep 2018 v1

ORACLE Gold Partner

Specialized
Oracle RightNow CX
Cloud Service

ORACLE
Validated Integration

Oracle RightNow
Cloud Service

ORACLE
CLOUD
PLATFORM
R E A D Y

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1 INTRODUCTION

1.1 BACKGROUND

The BlueLeap Media Bar is a fully integrated package for the Oracle Service Cloud that provides four basic optional modules:

1. Full CTI integration
2. WebRTC voice calls
3. Conversational SMS capability
4. SMS Campaign capability

NOTE: Social Media Channels and Video are a separate package.

1.2 PURPOSE

The purpose of this document is to detail the components and installation procedure for the package. It is not indented as a user guide but does provide essential functional and technical background for administrators.

1.3 AUDIENCE

This document is intended for experienced Oracle Service Cloud Administrators.

1.4 SUGGESTED INSTALL ORDER CHECKLIST

Item	Check
1. Objects	
2. Work Spaces	
3. Reports	
4. BlueLeapAPI Account Creation	
5. Profile Permissions	
6. Account Settings	
7. Object Event Handlers	
8. Add-in(s) & Parameters	

1.5 PRODUCT VERIFICATION TEST (PVT)

It is recommended to do the following checks (if the component is enabled):

Item	Check
1. Send SMS from a contact	
2. Receive SMS from a contact	
3. Send a Campaign	
4. Reply to a Campaign	
5. Perform a WebRTC call	
6. Connect to Finesse	
7. Receive a CTI call from Finesse	
8. Make a CTI call to Finesse	

2 SOLUTION OVERVIEW

2.1 MEDIA BAR - CTI

Supports full control of feature visibility of CTI on the Media Bar (which buttons display etc)

2.2 CTI END TO END OVERVIEW

- Fully integrates with CISCO Finesse & UCCX using state-of-the-art REST API's
- Supports 'Screen Pop' matching of contacts to incoming calls within OSvC Agent Desktop
- Supports 'Click To Dial' and 'Manual Dial' from within the OSvC Agent Desktop
- Supports Finesse states (Ready/NotReady) and sub-types (Reason Codes)
- Stores all call data in the OSvC database for reporting and analysis
- Supports auto incident creation on incoming calls (via user-configuration setting)
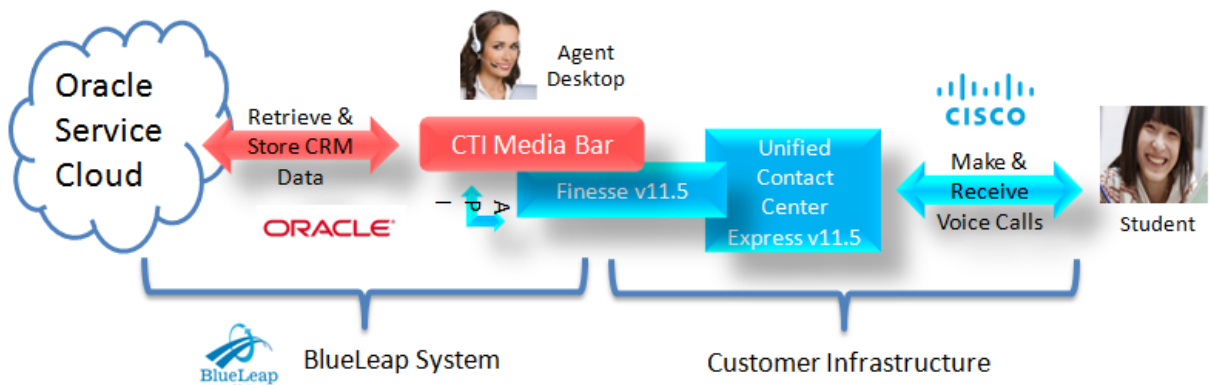
2.3 MEDIA BAR – WEBRTC

Supports full control of feature visibility of WebRTC on the Media Bar (which buttons display etc)

2.4 WEBRTC END TO END OVERVIEW
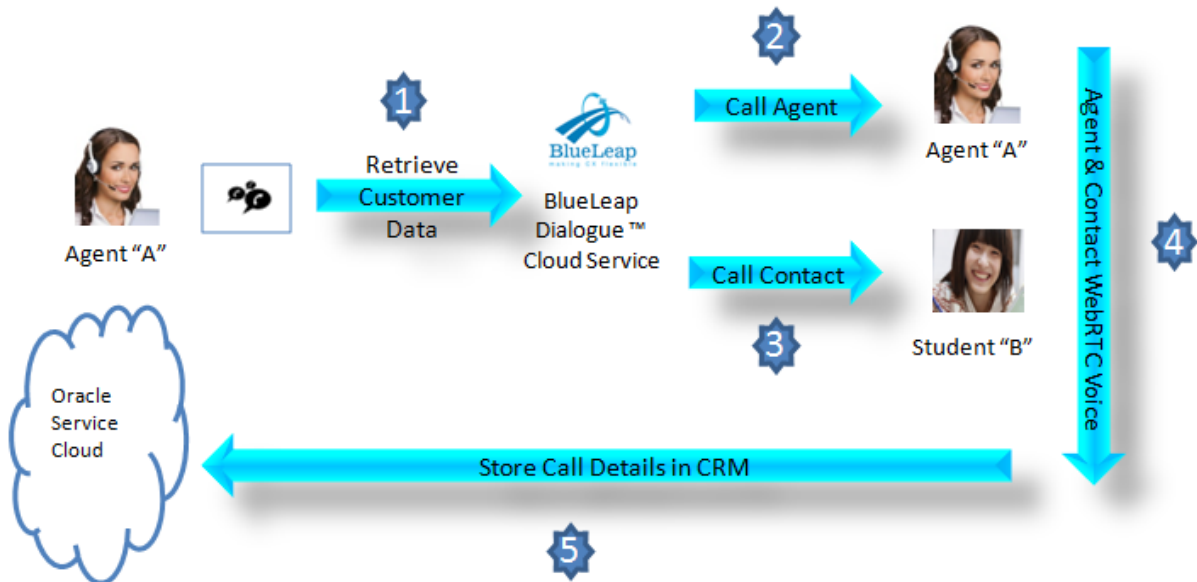
- The WebRTC ("Web Real-Time Communication") in the BlueLeap Media bar enables Agents to make calls directly over the internet.
- It does this by establishing an "operator connect" or "conference" call between two parties – the Agent and the Contact .
- This allows the Agent to talk on their own mobile phone to a Contact without using any other infrastructure, and the call details are logged in the OSvC in the standard interaction log.
- The CLI ("Caller ID") number visible to the Contact is the WebRTC host number NOT the Agent number in all cases.

2.5 MEDIA BAR – SMS & CAMPAIGNS
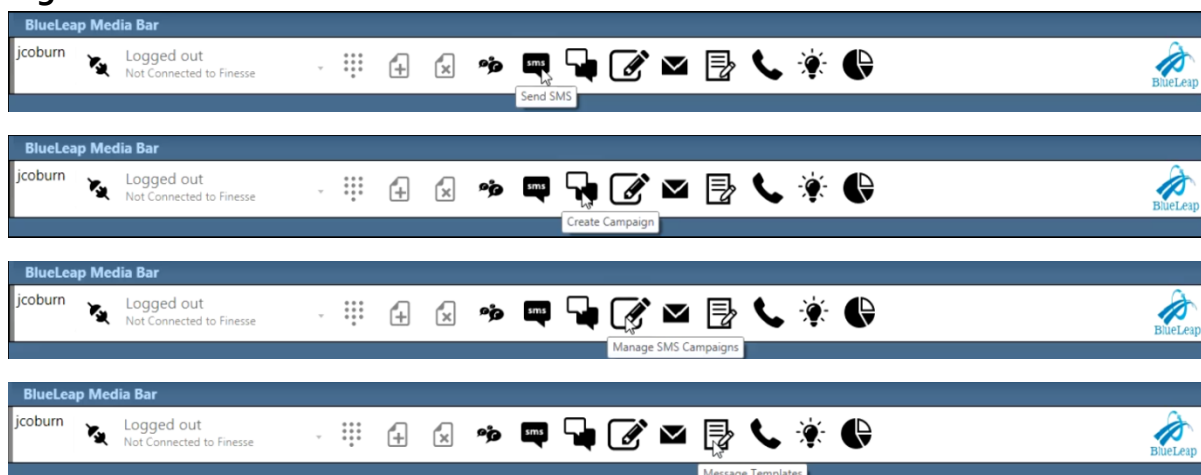
Supports full control of feature visibility of SMS on the Media Bar, Send SMS, and Create Campaign dialogs (which buttons display etc).

2.6 SINGLE SEND SMS BUTTON ADDIN

BlueLeap Single Send SMS control button can be inserted in to any workspace once the add in is loaded. It has the same functionality as the 'Send SMS' button from the Media Bar.
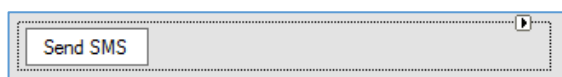
2.7 SEND FROM REPORT SMS ADDIN

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.

The report must have 1st column as **Contact ID** and 2nd Column as **Mobile Number.**

2.8 SMS & CAMPAIGNS END TO END OVERVIEW
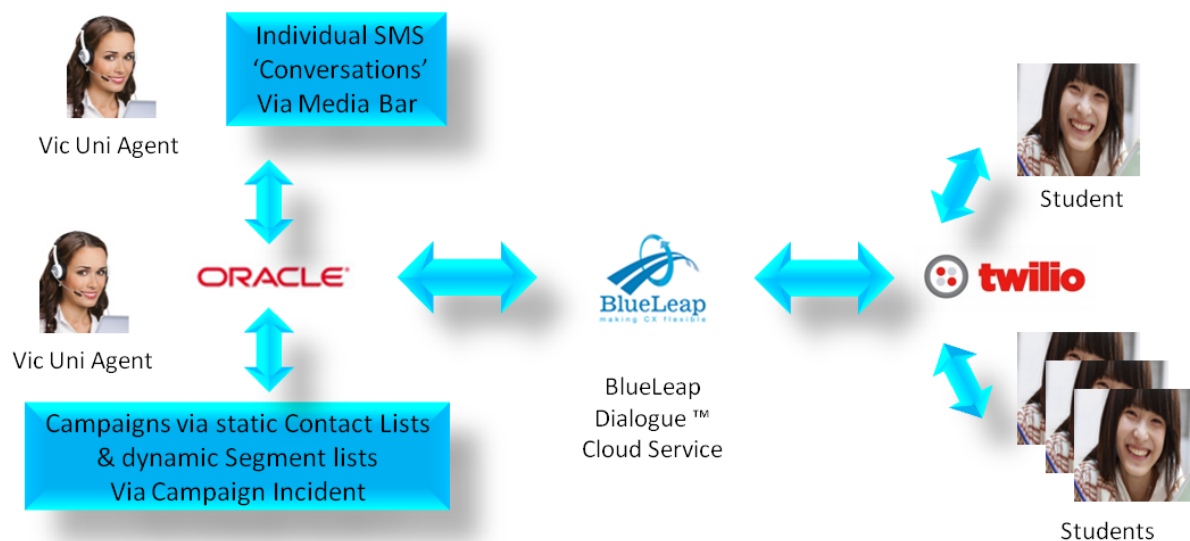
SMS – Inbound / Outbound

- Send from OSvC Agent Desktop Media Bar, Send SMS Button, or Report Inline SMSAddin
- Receive to OSvC Agent Desktop

SMS – Campaigns

- Send via batch capability from contact lists stored in OSvC
- Personalisation of campaign text messages with keywords from OSvC database
- Scheduling of campaigns to start at a future date & time
- Full management support for scheduled campaigns including: Edit and Cancel
- Ability to Stop (Cancel) campaigns while they are executing from management interface

All SMS Facilities Include:

- Send with normal numeric (e.g. 123-123-1234) or informational alphanumeric SMS Number (e.g. 1300CUST) to supported countries
- Templates feature for standard texts
- Full Opt-Out / Opt-In support, including user-configurable 'soft' keywords and custom messages
- Optional user-configurable creation of incidents for inbound (SMS replies) &/or outbound (sent SMS), with supporting user-configurable workflow
- User-configurable automatic Prefix &/or Suffix
- All Sent SMS (Outbound) History stored in OSvC Agent Desktop
- All SMS Replies (Inbound) History stored in OSvC Agent Desktop
- Full set of Standard Reports and Dashboards

2.9 SMS & CAMPAIGNS TECHNICAL OVERVIEW

The solution uses the BlueLeap CTI Media Bar, Single Send Button, Send from Report, and BlueLeap Dialogue™ Cloud Service that integrates back to OSvC Agent Desktop.
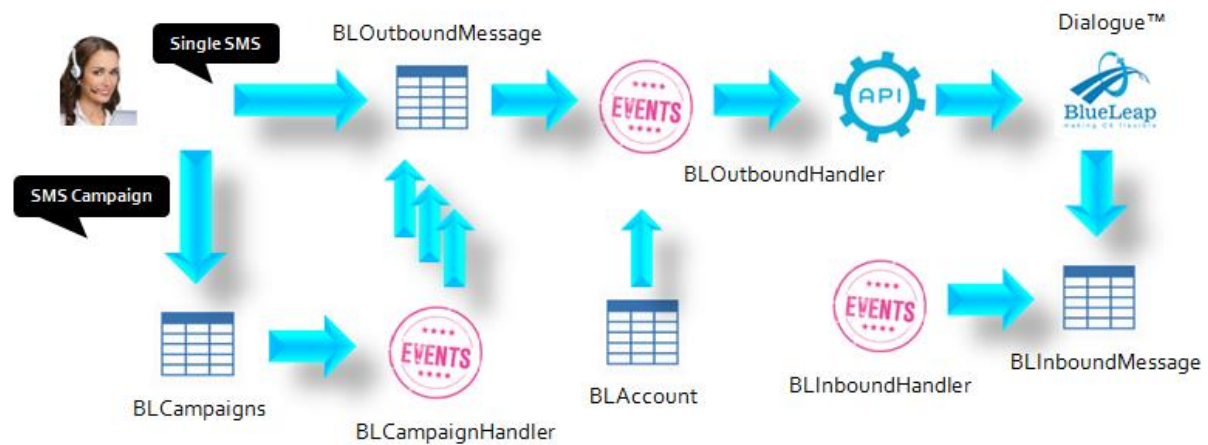
The OSvC has 5 key data structures:
1. BLAccount
2. BLCampaigns
3. BLInboundMessage
4. BLOutboundMessage
5. BLMessageTemplate

There are 3 object event handlers that do the 'real' work:
1. BLOutbound
2. BLInbound
3. BLCampaign

These are generally populated by the User Interfaces in OSvC Media Bar (Single SMS & SMS Campaigns) then acted upon by event handler(s) that extract the data and send to Dialogue ™ via an API. Dialogue ™ in turn populates return data via an API.

3 FILES

These are the files that you should receive in your distribution. They generally have a version suffix of "Major_Minor" format.

#	Package	Install	Comments
1	Objects.zip	30 min	
2	Handlers.zip	30 min	
3	Workspaces.zip	10 - 30 min	
4	Reports.zip	30 – 60 min	
5	Oracle.RightNow.Cti.zip	10 min	Media Bar
6	BlueLeapAddins_v1.zip	10 min	Single Send SMS Button Addin
7	Blueleap_SMS_ReportAddIn.zip	10 min	Send from Report SMS Addin

4 OBJECTS

4.1 BLDIALOGUE

These are the essential objects for core functions.

1) Object Designer -> Import -> <select file>
2) <select custom objects to import> -> import
3) If upgrading allow to merge (tool will detect)

#	Package	Object
1	BLDialogue	BLAccount
2	BLDialogue	BLCampaigns
3	BLDialogue	BLInboundMessage
4	BLDialogue	BLMessageTemplate
5	BLDialogue	BLOutboundMessage
6	BLDialogue	Contact.sms_opt_out

4.2 BLUELEAPCTI

These are the essential objects for CTI functions.

1) Object Designer -> Import -> <select file>
2) <select custom objects to import> -> import
3) If upgrading allow to merge (tool will detect)

#	Package	Object
7	BlueLeapCTI	InteractionLog
8	BlueLeapCTI	CallSourceMenu
9	BlueLeapCTI	CallStatusMenu
10	BlueLeapCTI	Account.FinesseAccount
11	BlueLeapCTI	Account.FinessePasswd
12	BlueLeapCTI	Account.FinesseExtension
13	BlueLeapCTI	Account.FinesseAutoLogin

4.3 OPTIONAL

These are the optional objects to allow data to be loaded from external systems for use in the personalisation feature in SMS Campaigns.

1) Object Designer -> Import -> <select file>
2) <select custom objects to import> -> import
3) If upgrading allow to merge (tool will detect)

#	Package	Object
1	BLDialogue	Comtemp1
2	BLDialogue	Comtemp2
3	BLDialogue	Comtemp3
4	BLDialogue	Comtemp4
5	BLDialogue	Comtemp5
6	BLDialogue	Comtemp6

5   WORK SPACES

These workspaces are used to view &/or edit data and can be setup on a profile-by-profile basis.

1) Extract files from zip
2) \Workspaces and Workflows -> New Folder -> <Folder Name>
3) \Workspaces and Workflows -> New Workspace -> <Import Workspace (wizard)>
4) Save & Close -> <Folder Name> <Work Space Name>

#	Folder Name	Work Space Name
1	\BLDialogue	BLAccountWS
2	\BLDialogue	BLCampaignsWS
3	\BLDialogue	BLContactTemplateWS
4	\BLDialogue	BLInboundMessageWS
5	\BLDialogue	BLInteractionLogWS
6	\BLDialogue	BLMessageTemplateWS
7	\BLDialogue	BLOutboundMessageWS

The BLContactTemplateWS is a template for an SMS History Tab that can optionally be incorporated in to any contact workspace.

It needs to be designed in to the target workspace with:

1) Custom field Contact.sms_opt_(suggest at the top)
2) Report BLContactOutboundSMS (suggest at the top)
3) Report BLContactInboundSMS (suggest at the bottom)

The sample structure in Workspaces design mode tab is:

- Tab Set
  - SMS History
    - Table
      - SMS Opt-Out
      - Spacer
      - Spacer
      - Spacer
      - Report
      - Report

Once setup it should look something like this:

SMS History (102)	Notes	File Attachments	Outreach	Prospect	(OLD) SMS History	Organizations

SMS Opt-Out No ▾   [Send SMS]   Contact WS - BlueLeap

Sent	Message	Type	Status	Sent By	Campaign	Incident	
14/09/2018 02:42 AM	From BlueLeap: testing from suresh from OVI to james R	Message Campaign	Sent	Suresh Thirukoti	50		▼
14/09/2018 12:37 AM	From BlueLeap: new suresh cpm versions t1 Reply OUT t	SMS	Sent	James TestAccount			
13/09/2018 05:32 AM	From BlueLeap: check cpms Reply OUT to opt out	SMS	Sent	James TestAccount			
11/09/2018 08:11 PM	From BlueLeap: mb test alpha Reply OUT to opt out	SMS	Sent	James TestAccount			▼
11/09/2018 07:36 PM	From BlueLeap: test a long multi seg sms 111111111111	SMS	Sent				▼
11/09/2018 07:24 PM	From BlueLeap: bui Reply OUT to opt out	SMS	Sent				▼
10/09/2018 07:05 PM	From BlueLeap: dom correct? Reply OUT to opt out	Message Campaign	Sent	James TestAccount	41		▼
10/09/2018 06:55 PM	From BlueLeap: what domain prey tell Reply OUT to opt	Message Campaign	Sent	James TestAccount	38		▼
10/09/2018 02:05 AM	From BlueLeap: test sched1 Reply OUT to opt out	Message Campaign	Sent	James TestAccount	37		▼
07/09/2018 06:22 PM	From BlueLeap: check sms system for ir Reply OUT to op	SMS	Sent	James TestAccount			
06/09/2018 04:46 PM	From BlueLeap: vu t1 Reply OUT to opt out	SMS	Sent	James TestAccount			
29/08/2018 04:31 AM	From BlueLeap: test234 Reply OUT to opt out	SMS	Sent	James TestAccount			▼
23/08/2018 02:01 AM	From BlueLeap: You're in :-) I	SMS	Sent	James TestAccount			

Received	FromNumber	Message	Campaign	Incident	
14/09/2018 02:42 AM	+61418108078	got it well done			▼
14/09/2018 12:38 AM	+61418108078	new suresh cpm versions t1 reply			
13/09/2018 05:32 AM	+61418108078	cpms look ok for outbound			
07/09/2018 06:23 PM	+61418108078	got ir test			
06/09/2018 04:48 PM	+61418108078	vu t1 reply			
23/08/2018 02:01 AM	+61418108078	IN			
23/08/2018 02:00 AM	+61418108078	OUT			
13/08/2018 05:44 AM	+61418108078	yo reply to this REPLY			
25/07/2018 07:12 PM	+61418108078	reply no p no t test	34	16173	▼
06/06/2018 02:51 AM	+61418108078	V24.2 reply			
28/05/2018 04:23 PM	+61418108078	And all the delayed schedule msgs			
28/05/2018 04:22 PM	+61418108078	Yes got it			
27/05/2018 05:56 AM	+61418108078	TEST CID MATCH5			

6 REPORTS

If updating, then delete the old report before installing the new report. All reports are created by these steps:

1) Reports Explorer -> \Public Reports -> <New Folder> -> < Folder Name>
2) <New Report> -> <Import Existing (wizard)> -> < Report Name>
3) Save & Close -> <Folder Name> < Report Name>

6.1 BLDIALOGUE SYSTEM REPORTS

These reports allow access to the data in the core objects and search and display functions.

If workspaces are enabled with permissions, they also allow viewing via the corresponding workspace on double click.

#	Folder Name	Report Name	Note ID Number for AddIn
1	\BLDialogue	BLAccount	
2	\BLDialogue	BLCampaigns	
3	\BLDialogue	BLContactInboundSMS	
4	\BLDialogue	BLContactListSearchByID	YES
5	\BLDialogue	BLContactOutboundSMS	
6	\BLDialogue	BLInboundMessage	
7	\BLDialogue	BLManageCampaigns	
8	\BLDialogue	BLMessageTemplate	YES
9	\BLDialogue	BLOutboundMessage	

6.2 BLCTI SYSTEM REPORTS

These reports allow access to the data in the core objects and search and display functions.

If workspaces are enabled with permissions, they also allow viewing via the corresponding workspace on double click.

#	Folder Name	Report Name	Note ID Number for AddIn
1	\BLCTI	BlueLeapSearch_STD	YES - Standard
2	\BLCTI	BlueLeapSearch_VU	YES – Includes Custom Fields
3	\BLCTI	InteractionLog	YES

6.3 BLMESSAGE REPORTS

These reports allow various user reporting for SMS Messages and SMS Message Campaigns.

If workspaces are enabled with permissions, they also allow viewing via the corresponding workspace on double click.

#	Folder Name	Report Name
1	\BLMessage	Contacts Opted Out
2	\BLMessage	Send SMS from Report
3	\BLMessage	SMS Replies (Select Dates)
4	\BLMessage	SMS Sent (Select Dates)

6.4 BLCAMPAIGNS REPORTS

These reports allow user reporting for SMS Message Campaigns with drill down to a dashboard report.

#	Folder Name	Report Name	Comment
1	\BLCampaigns	Campaign Dashboard	Need to create
2	\BLCampaigns	Campaign Dashboard A	Top – Campaign Info
3	\BLCampaigns	Campaign Dashboard B	Bottom Left – Sent SMS
4	\BLCampaigns	Campaign Dashboard B	Bottom Right – SMS Replies
5	\BLCampaigns	Campaigns (Select Dates)	Link Required to Dashboard
6	\BLCampaigns	Contact Lists Used (Select Dates)	Link Required to Dashboard

The 'Campaigns' report needs a link to the 'Campaign Dashboard' report keyed by ID:

- When importing click on 'ID' column, then <Report Linking> icon in the ribbon and follow prompts to link the report to the 'Campaign Dashboard' ID.

The Campaign Dashboard provides a comprehensive report of all SMS campaign details directly from a Campaign ID or more commonly from a 'drill down' from the campaign summary report.

- Must be created in each environment.

Create dashboard by these steps:

1) Reports Explorer -> <New Dashboard>
2) Create a 3-panel dashboard
3) Drop reports as follows in screenshots
4) Click <Title Bar> icon to hide title bars in reports (as required)
5) Set options by <options> icon to combine filters – tick the following two options:
   a. Combine filters on the same field in search dialog
   b. Combine filters with the same name and type in search dialog

6) Save & Close as <Folder Name> 'Campaign Dashboard'
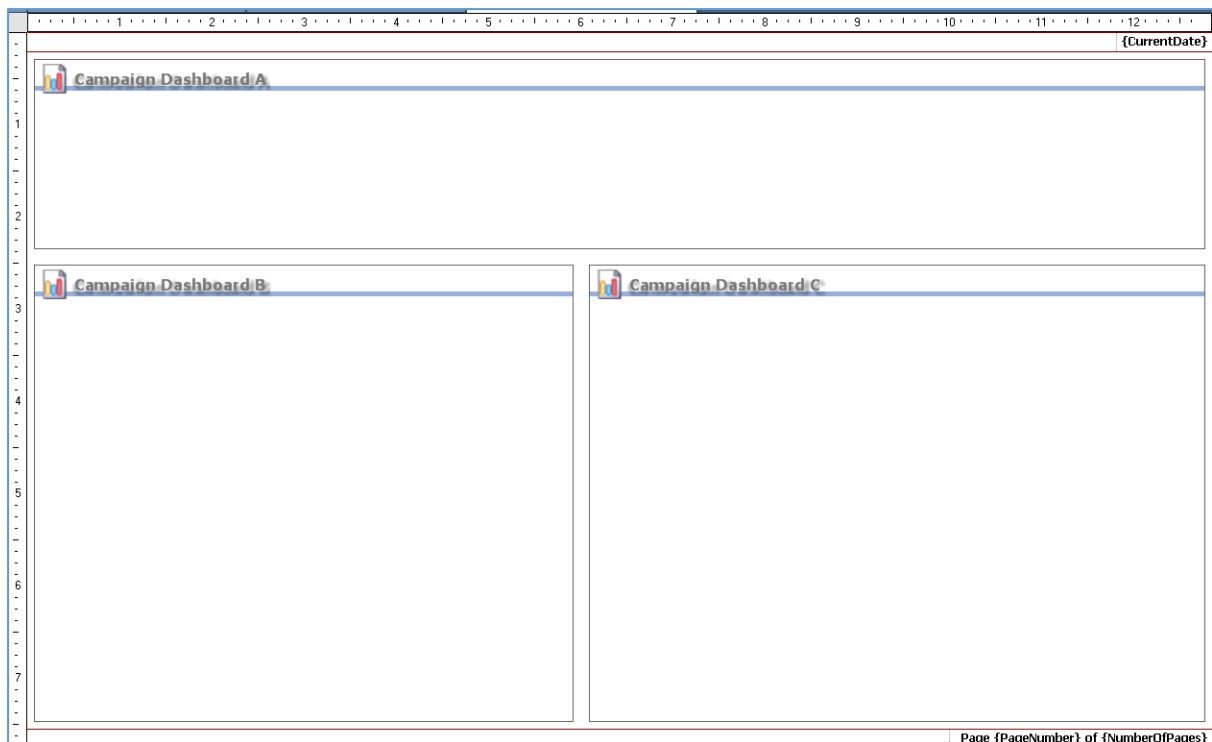
6.5 BLVOICE REPORTS

These reports allow various user reporting for SMS Messages and SMS Message Campaigns.

If workspaces are enabled with permissions, they also allow viewing via the corresponding workspace on double click.

#	Folder Name	Report Name
1	\BLVoice	Voice Calls (Select Dates & Call Source)
2	\BLVoice	Voice Calls by Agent (Select Dates & Call Source)

7 BlueLeapAPI Account Creation

A user account is required for communications from BlueLeap Dialogue to OSvC.

The user name needs to be **BlueLeapAPI** and the password advised to BlueLeap.

The permissions also need to be set up as per recommendations.

7.1 Example API Account Setup View

8 Account Settings

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).

The account fields should be set according to your account settings document (supplied separately).

9 Profile Permissions

9.1 SOAP – All

1) Profiles -> <select profile> -> Permissions Icon -> Administration Tab

9.2 Objects - Admin / Development (Maximum)

1) Profiles -> <select profile> -> Permissions Icon -> Custom Objects Tab

Profile					Create	Delete	Read	Update

#	Object	C	D	R	U
1	BLAccount	X	X	X	X
2	BLCampaigns	X	X	X	X
3	BLInboundMessage	X	X	X	X
4	BLMessageTemplate	X	X	X	X
5	BLOutboundMessage	X	X	X	X
6	InteractionLog	X	X	X	X

9.3 OBJECTS - RESTRICTED USER PROFILE (MINIMUM)

1) Profiles -> <select profile> -> Permissions Icon -> Custom Objects Tab

#	Object	C	D	R	U
1	BLAccount			X	
2	BLCampaigns	X		X	
3	BLInboundMessage			X	
4	BLMessageTemplate	X	X	X	X
5	BLOutboundMessage	X		X	
6	InteractionLog	X		X	

9.4 OBJECTS - BLUELEAPAPI USER PROFILE (MINIMUM)

1) Profiles -> <select profile> -> Permissions Icon -> Custom Objects Tab

#	Object	C	D	R	U
1	BLInboundMessage	X		X	X

9.5 WORK SPACES – PROFILES AS REQUIRED

To allow access to the work spaces they must be setup for access in the corresponding profile.

1) Profiles -> <select profile> -> Interfaces Icon -> Workspaces/Workflows
2) Match up according to requirements as per table below.

#	Editor	Workspaces
1	BLAccount	BLAccountWS
2	BLCampaigns	BLCampaignsWS
3	BLInboundMessage	BLInboundMessageWS
4	BLMessageTemplate	BLMessageTemplateWS
5	BLOutboundMessage	BLOutboundMessageWS
6	InteractionLog	BLInteractionLogWS

10 OBJECT EVENT HANDLERS

You associate object actions with event handlers using the process designer.

These should be setup last as they require the objects for successful testing.

1) Configuration-> Process Designer
2) <Import Latest Handler(s) from zip file>
3) Make sure ☑ Execute Asynchronously is checked
4) -> Save
5) <Test handler(s) via Test Button> -> Save
6) -> Deploy
7) <Associate latest version Handlers to Objects as per table>
8) -> Save
9) -> Deploy
10) If updating, then delete old handlers -> Save -> Deploy

10.1 HANDLER ASSOCIATIONS

#	Object	Event Handler Associations
1	BLCampaigns	Create & Update with BLCampaign
2	BLInboundMessage	Create with BLInbound
3	BLOutboundMessage	Create with BLOutbound

11 ADD-IN(S)

11.1 GENERAL

11.1.1 For new add-in installs
1) Add-in Manager -> New Icon -> Agent Desktop Add-In
2) Select zip file
3) Profile Access Icon -> <select profile(s)> -> <check allowed interfaces>
4) Set Server Configuration Properties
5) Save & Close

11.1.2 For add-in updates
1) Select Agent Desktop Add-In from Add-In Manager
2) Click update or folder button & select zip file
3) Profile Access Icon -> <select profile(s)> -> <check allowed interfaces>
4) Update Server Configuration Properties as required
5) Save & Close

11.1.3 For interface or profile updates
1) Select Agent Desktop Add-In from Add-In Manager
2) Profile Access Icon -> <select profile(s)> -> <check allowed interfaces>
3) Set / Update Server Configuration Properties
4) Save & Close

11.1.4 Parameters (Server Configuration Properties)
The parameters can be varied according to profile during the installation process to give different access features to different profiles. They can also be varied for different target environments and country telephony systems.

11.2 ORACLE.RIGHTNOW.CTI.ZIP

11.2.1 Environment Specific Parameters
Parameters that generally need to be changed for every installation. These should be updated after the reports have been installed.

#	Group	Parameter	Default	Comment
1	CTI	ReportID	<set to report id>	ID of CTI search report "BlueLeapSearch" which may change on new installs so needs to be checked & verified.
2	SMS	BLContactListSearchByID	<set to report id>	The report id of BLContactListSearchByID report that is used in the Campaigns UI for searching on contact list id which may change on new installs so needs to be checked & verified.
3	SMS	ManageCampaignReportID	<set to report id>	ReportID of BLManageCampaigns used by the Update SMS Campaigns dialog which may change on new installs so

			needs to be checked & verified.

11.2.2 Profile Specific Parameters

Parameters that generally can be used to customise the user experience by profile are:

| #	Group	Parameter	Default	Comment
4	Admin	EnableLogging	True (Should be set to false for production systems)	Logs internal system data for audit or debug purposes if required at %AppData%\BlueLeapLogger
5	SMS / RTC	LockInternationalCalls	false	Locks (or unlocks) access to country dialling for countries OTHER than LocalCountryCode
6	RTC	WebRTCDialPad	true	Display WebRTC dial pad menu option or not (assuming WebRTC is enabled)

11.2.3 Media Bar Report Icons

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"

11.2.4 Feature Visibility Options

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

- 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:

- 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	✔

- 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:

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	☐

11.2.5 Telephony General Parameters
Parameters for differing country telephony systems are:

#	Group	Parameter	Default	Comment
11	CTI	FinesseDomain		System URL for target UCCX system environment
12	CTI	OutboundPreviewCall VariableString	callbackin	Used for determining correct incoming call prefix when CISCO Finesse is performing a 'callback' operation
13	CTI	OutsidePrefix	o	Used for dialling out from an internal CISCO Finesse system

11.2.6 Telephony WorkFlow Parameters
Parameters for differing country telephony systems are:

#	Group	Parameter	Default	Comment
14	CTI	AutoOpenIncidentForIncomingPhoneCall	false	For incoming calls: No Match • Creates new contact populated with phone number, then • Creates incident with assigned field populated with logged in user and phone number Multiple matches • Displays dialog with matches, desired contact is selected with double click • Creates incident with assigned field populated with logged in user and phone number • (no contact record displayed) Single Match • Creates incident with assigned field populated with logged in user and phone number • (no contact record displayed)

11.2.7 System Specific Parameters

Systems parameters which are generally not changed are:

#	Group	Parameter	Default	Comment
15	Admin	EnableHTTPS	true	System setting for HTTPS or HTTP target UCCX system environment
16	SMS	SMSMaxLength	500	Maximum length of a message in characters; The system will break messages > 160 in to multiple segments (each segment is charged separately). Note the practical maximum SMS message limit is 1600 characters (10 segments) and should not be exceeded.

11.3 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.
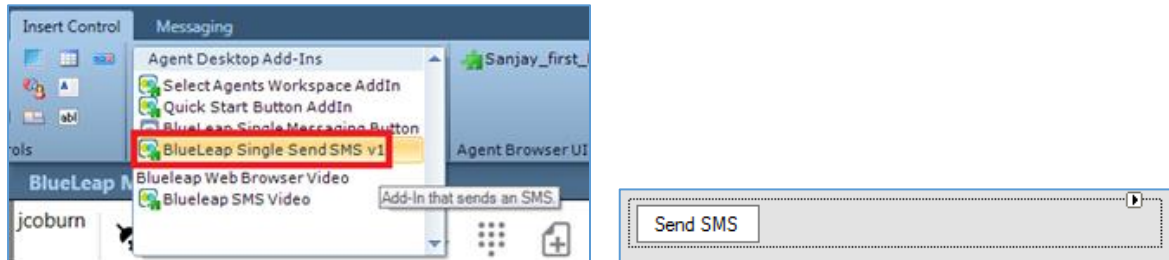
It has one config parameter to show template function or not:

Server Configuration Properties

Class Name	Property Name	Value
BlueLeapAddins.SMSAddin.WorkspaceNoteUpdateAddInFactory	ShowTemplates	☑

To add simply select from control dropdown on any workspace:

11.4 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**
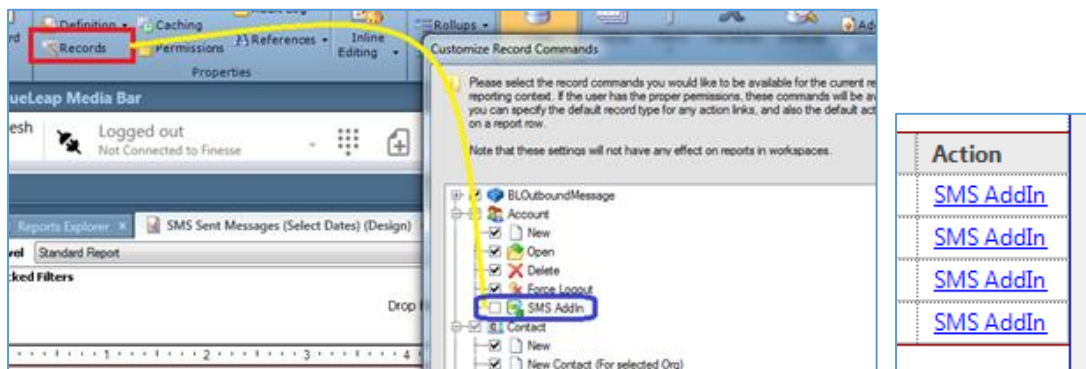
12 DEFINITIONS, ACRONYMS AND ABBREVIATIONS

Term	Definition
Oracle Service Cloud (OSvC)	Oracle Service Cloud is a CRM system that makes it possible for you to better understand your customers and quickly deliver the right answers at the right time through preferred service channels and devices. It provides fast service in the field, connect silos, or adhere to policies and regulations which makes it easy for customers to engage with your brand; your employees to serve customers; and your organization to adapt to changing business needs.
Customer Portal	As per OSvC Online User Guide: https://documentation.custhelp.com/euf/assets/docs/november2016/olh/index.html#CustomerPortal/topicrefs/c_getting_started.html The OSvC Customer Portal Cloud Service (Customer Portal) is customer support interface. Customers can search for information, review the contents of your knowledge base chat community administration interface You'll configure your customer portal by editing the template, pages, and widgets that make up the customer interface. Additional configuration work occurs on the administration interface, so it's as important to have an understanding about Oracle Service Cloud as it is to understand the structure of the Customer Portal and how to work with the code it uses.
Desktop Add-in	The desktop add-ins framework lets users extend the reach of the Oracle Service Cloud A set of complementary features in Oracle Service Cloud, including workspaces, workspace rules, guides, agent scripts, script rules, workflows, and add-ins, each representing a different, powerful way of interacting with records in the knowledge base. While each component serves a distinct purpose, they can be used together to create a highly adaptive work environment.agent desktop by creating custom A tool for placing titles, spacers, reports, and other advanced features on a workspace.controls, components and applications that live within the desktop. These components can be added to the different visual areas of the agent desktop such as the An interface element containing a list of options for working in Oracle Service Cloud, including access to other areas of the product and shortcuts for adding records and items to the knowledge base. The application menu also contains options for changing personal settings and password and customizing the content pane and navigation pane display. Staff members can also exit their application from this menu.application menu, status bar, The configuration of the content pane when working with answers, contacts, incidents, opportunities, organizations, and tasks; when working in Chat; and when working with quotes, quote products, and service opportunities. Standard workspaces exist for each type of workspace, and custom workspaces can be created. The workspaces staff members use depend on the workspaces selected in their profile, workspaces or The area on the left and right side of the console where staff members work with navigation lists, select items to open on the content pane, and search the knowledge base. In the default configuration, the left navigation pane contains Recent Items and Navigation tool windows; the right navigation pane contains the Quick Search tool window. What appears on the navigation pane depends on the navigation set assigned in each staff member's profile and the permissions assigned in the profile. Each navigation pane can also be

	customized by staff members. navigation pane. These components are written using the .NET programming platform and generally automate steps within the application, integrate with external systems, or create entirely new and real-time extensions within the agent desktop.
Report	Oracle Service Cloud includes several standard reports for your benefit. These reports include a wide range of information that have been pre-defined to give you insight into usage and performance regarding your site. These reports allow you to gain insight as to how your site is being utilized by your customers and how effectively staff members are working in your applications. Many reports offer a unique presentation of data, and some reports contain similar information presented in different ways. Report output can be in either graphical or tabular form.
RestAPI	As per Developer Guide: http://documentation.custhelp.com/euf/assets/devdocs/november2015/Connect_PHP/Default.htm The Connect REST API (REST API) allows customers and partners to integrate with the Oracle Service Cloud platform using representational state transfer (REST) web services. In the REST API, each CCOM object is represented as a REST collection resource. REST resource names are plural and use camel-case capitalization style. For example, Incident in CCOM is incidents and Purchased Product is purchased Products in the REST API. The hierarchical structure of the REST collection resource follows the CCOM object structure, except that property names corresponding to CCOM fields and sub-objects use camel-case capitalization style. Custom objects are typed objects similar to the Connect PHP API. For example, CustObjec.Custom1 in the Oracle Service Cloud database remains CustObjec.Custom1 as a REST resource. Custom fields are nested under the customFields sub-resource and follow the same CCOM structure
Dialogue ™	This is the core logic that processes information between and within services. It includes the following: • Low code configuration BPM processing • Processing Logic • Platform interaction code
Server-Side Processing	Server-side operations also include processing and storage of data from a client to a server, which can be viewed by a group of clients. Advantage: This lightens the work of your client.
Desktop Processing (Agent Desktop)	Oracle Service Cloud Dynamic Agent Desktop Cloud Service enables you to deliver superior customer experiences by unifying enterprise systems and guiding call center agents through business processes across channels, agent pools, and geographies. Capture, track, assign, and manage customer requests, from initial contact through resolution across all channels, including social media.
Handler	Object event handlers are available for both custom objects and standard objects.Custom object event handlers act on custom objects, whereas standard object event handlers act on standard objects in the Connect Common Object Model, including Answer, Contact, Incident, Opportunity, and Organization.
Add-In	The desktop add-in framework lets application developers add custom components, or add-ins, to Oracle Service Cloud to integrate with other applications on staff members' workstations. Add-ins are uploaded using the Add-In Manager. From the manager, you can provide or deny access to individual add-ins for each profile and interface. Staff members who

	are granted access to use add-ins will have the necessary add-in files downloaded to their workstations. For information about managing add-in permissions through profiles, refer to Customizing Profiles. For information about creating add-in files, refer to Connect Desktop Add-In Framework (.NET). http://documentation.custhelp.com/euf/assets/devdocs/may2017/Connect_AddIn_Framework/Default.htm