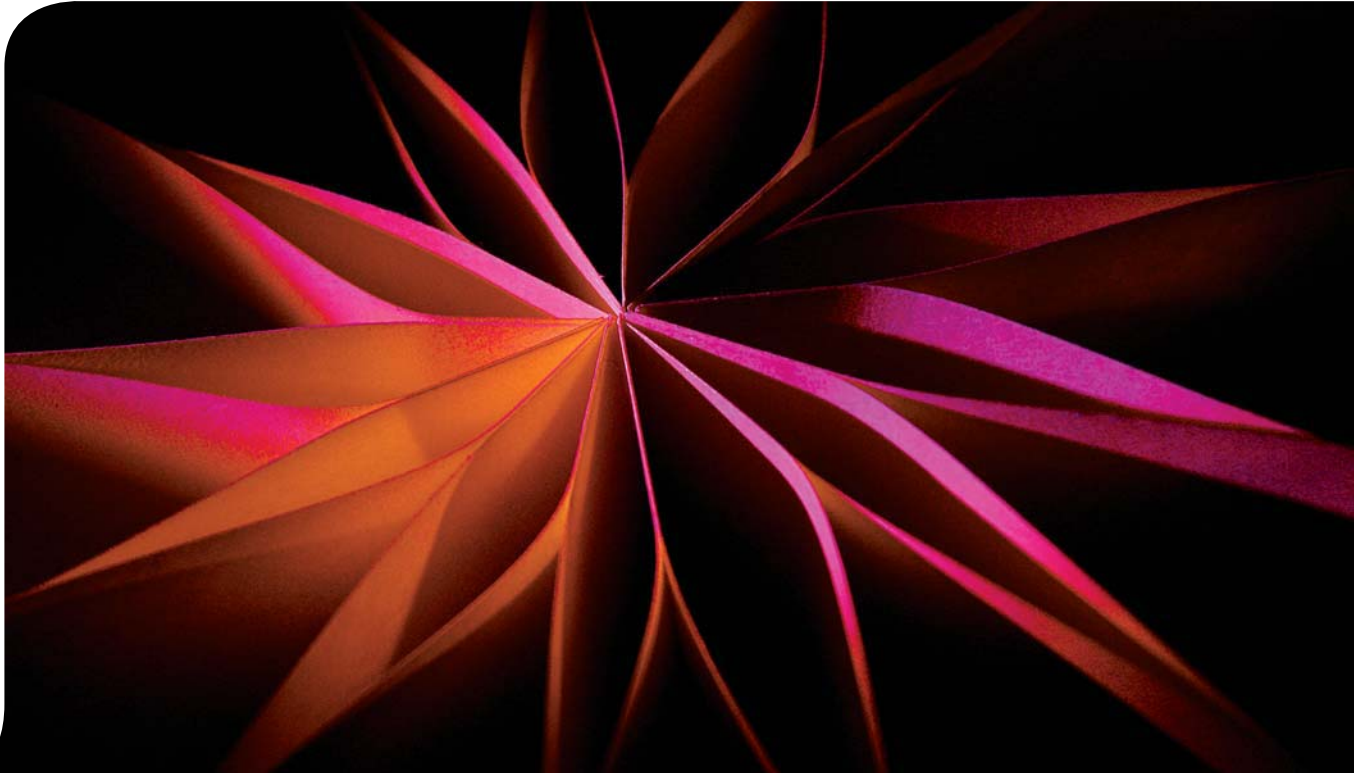


ShoreTel Contact Center Release Notes



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Patents

This product is covered by one or more of the following patents: United States patent 6,996,059, United States patent 7,003,091, United States patent 7,167,486, United States patent 7,356,129, Canadian patent 2,316,558, United States patent 7,379,540, United States patent 7,386,114, United States patent 7,450,574 and United States patent 7,450,703. The product is also covered by other pending patent applications. ShoreTel, Inc. All rights reserved.

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Changes to Upgrading and Installing ShoreTel Contact Center

Upgrading to Contact Center 6

Upgrading to Contact Center 6 is similar to previous upgrades. However, there are a few things you need to be aware of:

- You can directly upgrade to Contact Center 6 from Contact Center 5 or 5.1.
- If you are upgrading from Contact Center Server 5 to 6, you need to also upgrade your agents to ShoreWare Agent Toolbar 6. Any attempts to run ShoreWare Agent Toolbar 5 using the Contact Center 6 server results in an application error.

For upgrades from Contact Center Server 5.1 to 6, you may need to upgrade your agents to ShoreWare Agent Toolbar 6. If an upgrade is required, agents receive a system message when logging into Agent Toolbar.

- Windows Server 2008 32-bit support for ShoreTel Contact Center is now available for existing Contact Center systems. This means that if you are running Contact Center on Windows Server 2003, you can now upgrade to Windows Server 2008.

However, you do need to uninstall the ShoreTel platform before upgrading to Windows 2008, and then reinstall the ShoreTel platform. Refer to the *ShoreTel Planning and Installation* guide for specific instructions.

- It is now mandatory for supervisors to use a password to log into Contact Center applications. If any of your supervisor accounts do not have specified passwords, you must edit the account to include a password. These passwords are now case-sensitive.

Supervisor accounts are created, and edited, using ShoreWare Contact Center Director. From the **Supervisors** entity > **Details** tab, specify a password in the **Password** field.

- You must manually backup and then reinstall any custom files you have saved in the ShoreWare Contact Center directory (such as reports, IVR prompts, and databases). These files are deleted during the upgrade process.
- If you plan to upgrade Contact Center supervisor applications using the active directory push method, Java 6 or higher must be installed on supervisor PCs.

- For previously saved historical reports containing fields removed in Contact Center 6, the report is automatically updated to no longer include these fields. Reports made up entirely of removed fields are displayed without data.

If a report includes user-defined formulas utilizing removed fields, the formula is automatically deleted from the system and the report updated to no longer include the formula, when upgrading to Contact Center 6. Your users can avoid this situation by editing their formulas so that they do not include removed fields, before upgrading to Contact Center 6.

Information on the specific historical report fields that have been removed can be found in Chapter 3 of this document.

Support for Windows® Server 2008 SP2

The Windows Server 2008 SP2 32-bit operating system (OS) is supported in ShoreTel Contact Center 6. You can run this OS on your Contact Center server, taking advantage of the Windows 2008 Server features.

Support for Windows 7 and Vista SP2

You can now install and run ShoreTel Contact Center's client applications on PCs running Windows 7 (32-bit and 64-bit versions), and Vista SP2 (32-bit version only).

Increase in the Number of Concurrent Agents

This version of ShoreTel Contact Center increases the maximum number of concurrent agents from 600 to 1,000. Refer to the *Contact Center Installation Guide* for specifics on the system requirements to support this number of agents and performance considerations.

Simpler Configuration to Manage a Redundant System

Previously, configuration of your redundancy system was part of the installation process. In the ShoreTel Contact Center 6 release, you setup and configure redundancy using ShoreWare Contact Center Director. See the section Changes in Managing Redundancy in Chapter 2 of this document for details.

New and Changed Features for Administrators

More Features in Standard Contact Center

The standard version of Contact Center now includes administrative and scripting features previously available only in Enterprise Contact Center. These features are:

- **Routing based on agent skill.** Calls can now be routed by agent skill. This feature is enabled in the Agents, Services, IRN, Domains, and System entities in ShoreWare Contact Center Director.
- **Defining call profile fields.** You can now define the priority call profile field in the Domains, IRN, and System entities; and the optional call profile fields in the Domains and System entities.
- **Specifying multiple overflow intervals.** You can now have multiple overflow intervals. Intervals are the amount of time in seconds after which a call will overflow (be put in the queue for other groups). Overflow intervals are specified in ShoreWare Contact Center Director's Services entity > Overflow tab.
- **Using additional call control script actions.** The Announce, Change Call Profile, Decision, Dial Digits, Factory Hook, Increase/ Decrease, Logic Switch, and Overflow actions are now available in ShoreWare GCCS Administration.

Call Control Script (CCS) Administration Removed

In ShoreTel Contact Center, CCS Administration has been removed. This tool is no longer available.

The Graphical Call Control Script (GCCS) Administration tool supercedes CCS Administration. GCCS Administration provides an easier way to work with call control scripts, since the application is graphical.

To launch GCCS Administration, from the ShoreWare Contact Center Director toolbar, click on the GCCS Administration icon.



You can also select **Graphical CCS Admin.** from the Tool menu.

Changes in Managing Redundancy

The Contact Center Server software and Contact Center applications support redundancy of the critical hardware components of your server. ShoreTel recommends redundancy of hard drives and power supplies to minimize system down-time and improve the recovery process in case of hardware failures. You must have the appropriate license to use the redundancy feature.

Managing your redundancy system is now easier through the use of enhanced features in ShoreWare Contact Center Director. You can now:

- Enable, disable, and reconfigure redundancy.
- Specify whether failover is automatic or manual.

To manage redundancy in ShoreTel Contact Center 6:

Step 1 From ShoreWare Contact Center Director, select the **System** entity > **Redundancy** tab.

Redundancy Settings for Primary Server (10.23.66.125)

Redundancy Mode

Enable Redundancy

IP Address of Secondary Server: 10.86.86.86

Failover Mode: Automatic
 Manual

Secondary Server Settings

Activate outbound on Secondary Stand Alone

Activate Email Application on Secondary Stand Alone

Step 2 To turn on redundancy, check **Enable Redundancy**. Uncheck to turn off redundancy.

If you turn off, and then at a later date turn redundancy back on, you need to resynchronize the databases, as explained in Chapter 6 of the *Contact Center Installation Guide*.

Step 3 Specify the IP address of the secondary server.

Step 4 Select the failover mode.

Manual failover mode requires that, in the case of a failover, you manually promote the secondary server to the master, and when appropriate, manually return the primary server to the master role. This process is explained below.

Step 5 If you want to activate either outbound calls or email functions on the secondary server, check the appropriate setting.

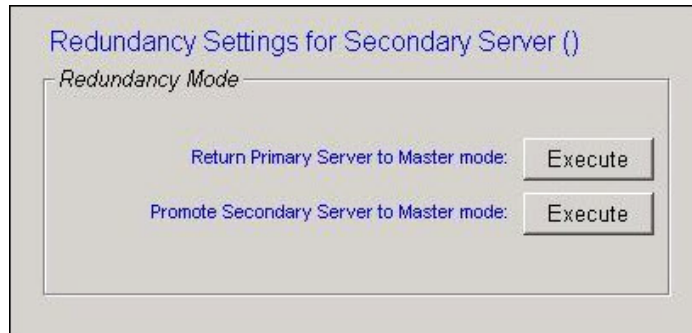
Step 6 Click **Save**.

You see a message that your services are being restarted automatically.

If you experience a system failure, and you have selected the manual failover mode:

Step 1 From your secondary server, launch ShoreWare Contact Center Director.

Step 2 Select the System entity > Redundancy tab.



Step 3 Promote the secondary server to master by clicking the **Execute** button associated with the option. Then click **Save**.

Step 4 Once your primary server has recovered and is ready to return to its primary role as master, click the **Execute** button associated with the option. Then click **Save**.

Real-Time Group Activity Event Feed

ShoreTel Contact Center 6 provides a real-time group activity event feed that may be used by third-party applications that subscribe to the event feeds. The Group Activity Event Feed provides:

- Extensive group information typically shown in a wallboard, such as calls in queue, calls answered or abandoned, average or max queue time, and number of agents in different states.
- Agent information for every group, for example agents logged in, agent states, call details, etc.
- DNIS information, such as calls answered or abandoned, and queue time.
- Specifics on agents requiring help.

Through the implementation of an API, ShoreTel Contact Center 6 provides information on group activity in the form of a JavaScript Object Notation (JSON) event feed.

This feature is enabled through a license. The license only allows the use of the interface for applications built using the API.

Note: To receive documentation and support on this event feed API, you need to be a member of the ShoreTel Developer Network.

Once you have acquired the license, the number of connections, and the port and event feed properties must be configured.

To configure ShoreTel Contact Center 6 to use the API:

Step 1 From ShoreWare Contact Center Director, select the System entity > Management tab > Licensing tab.

The screenshot shows the 'ShoreWare Contact Center Director - [System]' application window. The 'Management' tab is selected, and the 'Licensing' sub-tab is active. The main content area is titled 'Licensing Definition of Lock Device' and contains the following configuration fields:

Total concurrent Agents	50	Version	ECC
Incoming voice Agents	50	Incoming Chat Agents	50
Workforce Management	YES	Email Agents	50
Outbound Voice Agents	50	Progressive Dial-List Agents	50
IVR Ports	50	Peripherals	0
Full Visors	10	Monitor Only	10
Interaction Reports(CCIR)	YES		
Number of Real Time Adherence (RTA) Connections	10	Number of Real Time Group Activity Event Feed Connections	10

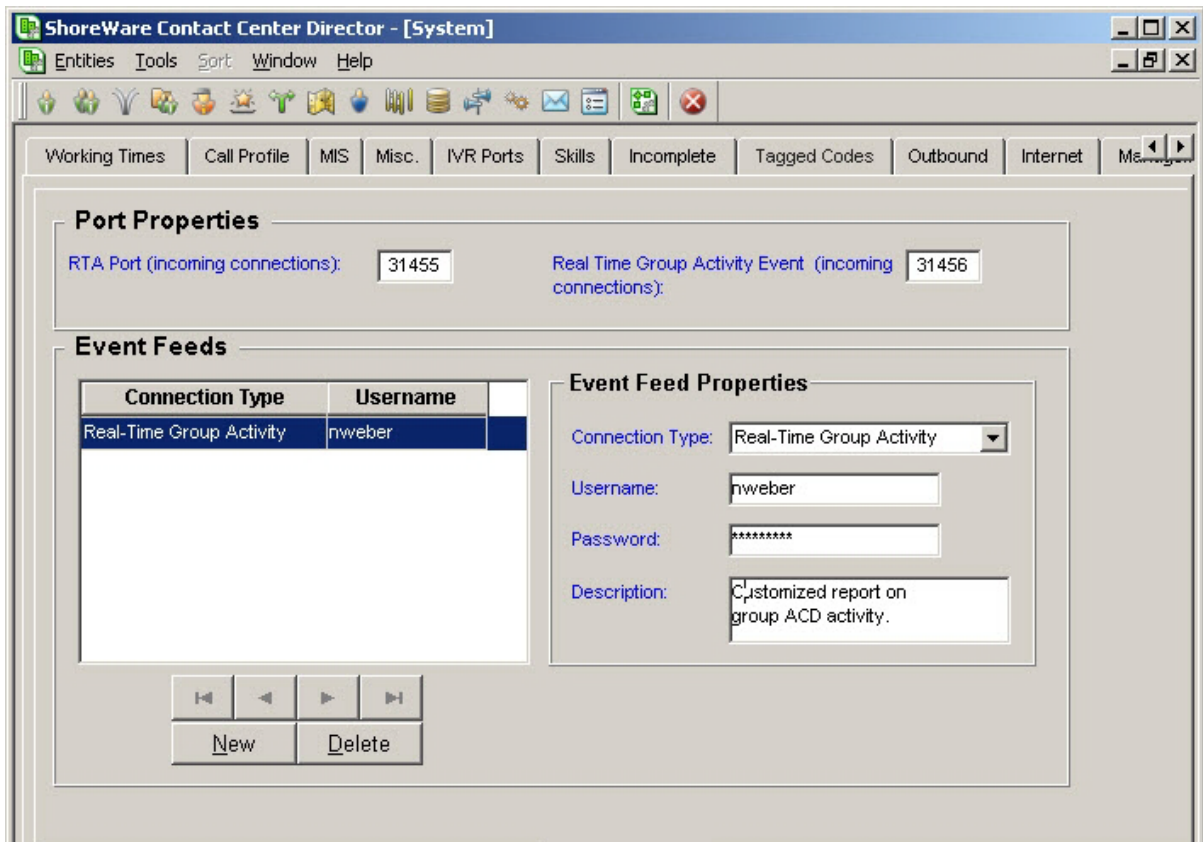
At the bottom of the window, there are buttons for 'Save', 'Undo', and 'Help'. A 'Licensing' section at the bottom left includes sub-tabs for 'DB Backup', 'Alerts', and 'Printer Account'.

Step 2 In the Number of Real Time Group Activity Connections field, specify the number of connections, and then click Save.

Step 3 Select the System entity > Interfaces tab > Event Feeds tab.

Step 4 In the Port Properties area, you can see the TCP port used by the event feed to accept incoming connections. The default port number is 31456.

Note: Do not change this value unless there is a port conflict (this is very unlikely).



Step 5 Click New.

Step 6 The **Event Feed Properties** area allows you to manage the credentials of multiple different connecting applications. For the application using this connection, specify the following information:

- **Connection Type.** Select **Real-Time Group Activity**.
- **Username.** The username required by the application to connect to the ECC server.
- **Password.** The password required by the application to connect to the ECC server.
- **Description.** A description of the application.

Step 7 Click Save.

You can also use the Event Feeds tab to edit and delete event feed account credentials.

New and Changed Features for Supervisors

Password Mandated for Contact Center Applications

You must now use a password to log onto Contact Center applications. If previously you were able access a Contact Center application without a password, your system administrator has edited your account to now include a password. For specifics on the password you must use, contact your system administrator.

Ans. Other Field Added to Real-Time Reports

The **Ans. Other** field, which provides information on the number of calls answered by another group, has been added to the following real-time reports:

- Daily Detailed Email Group
- Daily Detailed Group
- Detailed Email Group
- Detailed Group

Enhancements and Changes to Historical Reports

This release of ShoreTel Contact Center includes the following enhancements and changes to historical reports:

- The date range for historical reports can now be defined relative to the current month, in addition to the current day or for a specific day.
- A new blank template, 20.2 Mailbox by Date, has been added. The 4.2 Group Agents blank template has been renamed 4.2 Group Agents by Date.
- Target Average Speed of Answer (TASA) fields added to ANI Domain, DNIS, and Group reports.
- For Agent and Group interval reports, new fields have been added to display the aggregate number of contacts within the interval. Existing fields that present an average over the span of the interval remain.

- Fields that display data on hold times for Automatic Call Distribution (ACD) calls, and the number of agents simultaneously logged in, have been added to Group reports.
- Unnecessary and redundant fields have been removed from historical reports.

Defining Relative Report Dates by Month

Previously, you could only define a report's date range relative to the current day, or for a specific day. You can now also define the date range relative to the current month. This feature is useful when you want to schedule the report to generate periodically.

To define a relative date range by month:

- Step 1** In an open template, right-click in the parameters area and from the menu chose **Parameters**. You can also click on the **Report Parameters** icon.
- Step 2** Click on a **Date** field in the Parameters window.
- Step 3** In the Date window, specify the **From** and **To** dates by using the **Now Minus Months** field to select the period of past months relative to the current month.

When the report is generated, the system calculates the From/To date as the current month minus the defined number of months.

Some hints on using a date range relative to the current month:

- If you specify a From and To relative monthly date range of 0, the report is generated from the first of the current month to the current day.

From

Now minus 0 Days

Now minus 0 Months

Specific: 02/17/2010

To

Now minus 0 Days

Now minus 0 Months

Specific: 02/17/2010

- If you specify a From relative monthly date range of 1, and a To range of 0, the report is generated from the first of the previous month to the current day.

From

Now minus 0 Days

Now minus 1 Months

Specific: 02/17/2010

To

Now minus 0 Days

Now minus 0 Months

Specific: 02/17/2010

- If you specify a From relative monthly date range of 5, and a To range of 5, the report is generated for the entire month that was five months ago. So a report with these parameters, generated on February 17, 2010, displays data for the month of September.

From

Now minus 0 Days

Now minus 5 Months

Specific: 02/18/2010

To

Now minus 0 Days

Now minus 5 Months

Specific: 02/18/2010

Step 4 Click OK.

New Blank Template

The 20.2 Mailbox by Date blank template has been added to Enterprise Contact Center. This template generates a report that provides information about email contacts in agent mailboxes, over a specified date and time range.

The 4.2 Group Agents blank template has been renamed 4.2 Group Agents by Date.

TASA Fields Added to Historical Reports

Fields that display data on the TASA have been added to all historical ANI Domain, DNIS, and Group reports.

TASA Fields Added to ANI Domain Reports

The following TASA fields have been added to historical ANI Domain reports:

- % ACD Calls Abandoned After TASA
- % ACD Calls Abandoned Within TASA
- % ACD Calls Answered After TASA
- % ACD Calls Answered Within TASA
- ACD Calls Abandoned After TASA
- ACD Calls Abandoned Within TASA
- ACD Calls Answered After TASA
- ACD Calls Answered Within TASA

TASA Fields Added to DNIS Reports

The following TASA fields have been added to historical DNIS reports:

- % ACD Calls Abandoned After TASA
- % ACD Calls Abandoned Within TASA
- % ACD Calls Answered After TASA
- % ACD Calls Answered Within TASA
- % Chat Contacts Abandoned After TASA
- % Chat Contacts Abandoned Within TASA
- % Chat Contacts Answered After TASA
- % Chat Contacts Answered Within TASA
- % Email Contacts Answered After TASA
- % Email Contacts Answered Within TASA
- % Total Contacts Abandoned After TASA
- % Total Contacts Abandoned Within TASA
- % Total Contacts Answered After TASA
- % Total Contacts Answered Within TASA
- ACD Calls Abandoned After TASA

- ACD Calls Abandoned Within TASA
- ACD Calls Answered After TASA
- ACD Calls Answered Within TASA
- Chat Contacts Abandoned After TASA
- Chat Contacts Abandoned Within TASA
- Chat Contacts Answered After TASA
- Chat Contacts Answered Within TASA
- Email Contacts Answered After TASA
- Email Contacts Answered Within TASA
- Total Contacts Abandoned After TASA
- Total Contacts Abandoned Within TASA
- Total Contacts Answered After TASA
- Total Contacts Answered Within TASA

TASA Fields Added to Group Reports

The following TASA fields have been added to historical Group reports:

- % ACD Calls Abandoned After TASA
- % ACD Calls Abandoned Within TASA
- % ACD Calls Answered After TASA
- % ACD Calls Answered Within TASA
- % Chat Contacts Abandoned After TASA
- % Chat Contacts Abandoned Within TASA
- % Chat Contacts Answered After TASA
- % Chat Contacts Answered Within TASA
- % Email Contacts Answered After TASA
- % Email Contacts Answered Within TASA
- % Outbound Calls Abandoned After TASA
- % Outbound Calls Abandoned Within TASA
- % Outbound Calls Answered After TASA
- % Outbound Calls Answered Within TASA
- % Total Contacts Abandoned After TASA
- % Total Contacts Abandoned Within TASA
- % Total Contacts Answered After TASA
- % Total Contacts Answered Within TASA
- ACD Calls Abandoned After TASA

- ACD Calls Abandoned Within TASA
- ACD Calls Answered After TASA
- ACD Calls Answered Within TASA
- Chat Contacts Abandoned After TASA
- Chat Contacts Abandoned Within TASA
- Chat Contacts Answered After TASA
- Chat Contacts Answered Within TASA
- Email Contacts Answered After TASA
- Email Contacts Answered Within TASA
- Outbound Calls Abandoned After TASA
- Outbound Calls Abandoned Within TASA
- Outbound Calls Answered After TASA
- Outbound Calls Answered Within TASA
- Total Contacts Abandoned After TASA
- Total Contacts Abandoned Within TASA
- Total Contacts Answered After TASA
- Total Contacts Answered Within TASA

New Aggregate Fields for Agent and Group Interval Reports

For Agent and Group reports that are based on an interval, fields have been added to display an aggregate total within the interval. Previously, fields in these reports only presented an average during the span of the interval.

For example, over an interval of an hour an agent answers 9 calls the first day and 11 calls the next day. In an interval report, the new field Global Aggregate ACD Calls Answered would display an aggregate of 20 calls for each day, while the existing field ACD Calls Answered would display an average of 10 calls for each day.

The new aggregate fields are:

- Global aggregate ACD abandoned after TASA (Group reports only)
- Global aggregate ACD answered after TASA (Group reports only)
- Global aggregate ACD calls abandoned
- Global aggregate ACD calls accepted (Group reports only)
- Global aggregate ACD calls answered
- Global aggregate ACD calls offered (Group reports only)
- Global aggregate ACD calls too long
- Global aggregate ACD calls too short
- Global aggregate Chat contacts abandoned after TASA (Group reports only)
- Global aggregate Chat contacts abandoned

- Global aggregate Chat contacts accepted (Group reports only)
- Global aggregate Chat contacts answered
- Global aggregate Chat contacts answered after TASA (Group reports only)
- Global aggregate Chat contacts offered (Group reports only)
- Global aggregate Chat contacts too long
- Global aggregate Chat contacts too short
- Global aggregate Cmltv forced release time (hh:mm:ss)(Group reports only)
- Global aggregate Cmltv hold time of ACD calls (hh:mm:ss)
- Global aggregate Cmltv idle time (hh:mm:ss)
- Global aggregate Cmltv interaction time of chat contacts (d, hh:mm:ss)
- Global aggregate Cmltv interaction time of email contacts (d, hh:mm:ss)
- Global aggregate Cmltv login time (hh:mm:ss)
- Global aggregate Cmltv release time (hh:mm:ss)
- Global aggregate Cmltv ring time of ACD calls (hh:mm:ss)
- Global aggregate Cmltv talk time of ACD calls (hh:mm:ss)
- Global aggregate Cmltv time of handling email contacts. (hh:mm:ss) (Group reports only)
- Global aggregate Cmltv time where all agents were busy (hh:mm:ss) (Group reports only)
- Global aggregate Cmltv Time With No Active Agent (Group reports only)
- Global aggregate Cmltv treatment time of ACD calls (hh:mm:ss)
- Global aggregate Cmltv wait time before answered (hh:mm:ss) (Group reports only)
- Global aggregate Cmltv wait time before answered of chat contacts (hh:mm:ss) (Group reports only)
- Global aggregate Cmltv wait time before answered of email contacts (hh:mm:ss) (Group reports only)
- Global aggregate Cmltv wait time in queue of abandoned calls (hh:mm:ss) (Group reports only)
- Global aggregate Cmltv wait time in queue of all calls (hh:mm:ss) (Group reports only)
- Global aggregate Cmltv wait time in queue of calls requesting callback (hh:mm:ss) (Group reports only)
- Global aggregate Cmltv wait time in queue of outbound ACD calls (hh:mm:ss) (Group reports only)
- Global aggregate Cmltv wait time of abandoned chat contacts (hh:mm:ss) (Group reports only)
- Global aggregate Cmltv wait time of all chat contacts (hh:mm:ss) (Group reports only)

- Global aggregate Cmltv wait time of all email contacts (hh:mm:ss) (Group reports only)
- Global aggregate Cmltv wait time of failed outbound ACD calls (hh:mm:ss) (Group reports only)
- Global aggregate Cmltv wait time of pending outbound ACD calls (hh:mm:ss) (Group reports only)
- Global aggregate Cmltv wait time of successful outbound ACD calls (hh:mm:ss) (Group reports only)
- Global aggregate Cmltv wrap-up time of ACD calls (hh:mm:ss)
- Global aggregate Cmltv wrap-up time of chat contacts. (hh:mm:ss)
- Global aggregate Cmltv wrap-up time of email contacts. (hh:mm:ss)
- Global aggregate Cmltv wrap-up time of outbound ACD calls (hh:mm:ss)
- Global aggregate Email contacts accepted (Group reports only)
- Global aggregate Email contacts answered
- Global aggregate Email contact answered after TASA (Group reports only)
- Global aggregate Email contacts answered by another group (Group reports only)
- Global aggregate Email contacts too long
- Global aggregate Email contacts too short
- Global aggregate Incoming NACD calls
- Global aggregate Outbound ACD calls as a consequence of abandoned calls (Group reports only)
- Global aggregate Outbound ACD calls as a consequence of callback (Group reports only)
- Global aggregate Outbound ACD calls as a consequence of Dial Lists (Group reports only)
- Global aggregate Outbound ACD dialed (Group reports only)
- Global aggregate Outbound ACD failed (Group reports only)
- Global aggregate Outbound ACD successful (Group reports only)
- Global aggregate Outbound ACD too long
- Global aggregate Outbound ACD too short
- Global aggregate Outgoing NACD calls

New Fields on Hold Time and Number of Logged In Agents Added to Group Reports

Fields that display data on hold times for ACD calls, and on the number of simultaneously logged in agents, have been added to Group reports. These fields are:

- Average hold time of ACD calls
- Average hold time of outbound ACD calls
- Cumulative hold time of ACD calls
- Cumulative hold time of outbound ACD calls
- Maximum number of agents logged in simultaneously
- Outbound ACD calls held

Removed Fields

Unnecessary and redundant fields have been removed from historical reports.

When upgrading from previous versions of ShoreTel Contact Center, saved historical reports containing removed fields are automatically updated to no longer include these fields. Reports made up entirely of removed fields are displayed without data.

If a report includes user-defined formulas utilizing removed fields, the formula is automatically deleted from the system and the report is updated to no longer include the formula. You can avoid this situation by editing your formulas so that they do not include removed fields, before upgrading to Contact Center 6.

Removed Agent Report Fields

Fields displaying the Service Time Interval (STI) for all contact types have been removed from Agent reports. These fields resulted in inconsistent and unpredictable data because agents do not have to have their own STI settings.

Removed ANI Domain Field

The Avg. Number of Domain Calls in Queue Concurrently field has been removed from ANI Domain reports. This field is not mathematically valid.

Removed Dial List Report Fields

The Dial List and Special Information Tone (SIT) fields have been removed from Dial List reports. The Dial List fields were redundant since the dial list is the subject of the report. Since SIT is not supported by ShoreTel, the SIT field was removed.

Removed DNIS Report Fields

The fields on calls abandoned or requesting callback while hearing the mandatory announcement have been removed from DNIS reports. The fields have been removed because these calls are accepted by a group only **after** leaving the mandatory announcement.

In addition, fields on DNIS contacts (calls, chat, and email) in the queue concurrently have been removed. These fields were not mathematically valid.

Removed Group Report Fields

Fields displaying data on calls abandoned or requesting callback while hearing the mandatory announcement, for all contact types, have been removed from Group reports. The fields have been removed because these calls are accepted by a group only after leaving the mandatory announcement.

In addition, fields on contacts (calls, chat, and email) in the queue concurrently have been removed. These fields were not mathematically valid.

Removed IVR Application Report Fields

The Avg. Number of Outbound Calls Handled Concurrently and Avg. Number of Inbound Calls Handled Concurrently fields have been removed from IVR Application reports. These fields are not mathematically valid.