

Telescan

# Spectrum Data Manager

## R2-14

*including Agent, Secure Delivery and Communications Server*

2014 Release 2

September 2014

### Overview

This document describes the enhancements made to the programs listed at the right.

In addition to the enhancements, various changes and corrections were made to the programs. These are listed at the end of the document.

Some of the enhancements and new features require that two or more of the programs be updated. Please note the section below labeled *Order of Updating Programs*.

#### Software Updated in Release 2— 2014

<b>Spectrum Data Manager</b>	<b>Version 14.2.0.0</b>
<b>Secure Delivery Server</b>	<b>Version 14.2.0.0</b>
<b>Alpha Server</b>	<b>Version 14.2.0.0</b>
<b>Email Server</b>	<b>Version 14.2.0.0</b>
<b>Fax Server</b>	<b>Version 14.2.0.0</b>
<b>SMS Server</b>	<b>Version 14.2.0.0</b>
<b>Spectrum Agent</b>	<b>Version 14.2.0.0</b>
<b>SmartScript Designer</b>	<b>Version 14.2.0.0</b>
<b>On-Call Editor</b>	<b>Version 14.2.0.0</b>
<b>Information Tables Editor</b>	<b>Version 14.2.0.0</b>

### Installing the Update

Included in your shipment are instructions for updating each of the programs, along with the corresponding update CDs. These include:



1. *Spectrum Data Manager, Secure Delivery and Comm Server R2-14*
2. *Spectrum Agent — Script Designer — On-Call Editor — Information Tables Editor R2-14*

#### ***Order of Updating Programs***

The recommended order for applying the updates is as follows: SDM, followed by the Secure Delivery Server and the Communications Server programs, then the Agent. The SmartScript Designer, the On-Call Editor and the Information Tables Editor may then be updated or installed on the computers at which they are used.

#### ***Manuals and Additional Documentation***

Manuals and other additional documentation may be found on the Spectrum Agent CD in a folder named '**Telescan Digital Documentation**'.

Carefully review the separately enclosed installation instructions and call with any questions. Phone support for the update is available from 9:00 AM to 5:00 PM Central Time at (314) 426-7662.

## Editing a Message while in a Page Ticket

You can now initiate the editing of a message when in the 'Entering Page' state. The Alt+Edit key (Alt+F11) will be recognized when in the 'Entering Page' state and will move the operator to the 'Saving Message' state on the message associated with the page ticket. A status bar over the message will indicate 'Editing Message'.

At this point, the interaction behaves like the 'Saving Message' state when arrived at via 'Delivering Message', with the difference that when the operator files the change (or escapes out of it), they return to the 'Entering Page' state. If the operator takes a call or puts a call on hold when in the midst of 'Saving Message', the system will exit the message ticket (saving what was changed, if anything) and push the page ticket on the 'Incomplete' stack before proceeding to either display the account for the inbound call ('taking a call') or clear the screen ('putting a call on hold').

This enhancement should facilitate minor editing or additions to a message by a dispatching operator. If patching is done through the page ticket, it will facilitate documenting the result of the patch within the message ticket.

## Using Page Ticket fields in a Transmit Script

A destination step in a Transmit Script can have certain fields that, if left blank, will default to a setting in the Account Master Record, for instance the email address, the pager ID, the cell number for an SMS, or the Client ID for a Secure Delivery message. With this update, the system has been enhanced to allow these blank fields to also be populated from a page ticket when the Transmit Script is initiated from a page ticket.

The AMR can still be used to provide a default value, but when initiated from a page ticket, the Transmit Script interpreter will first try to supply the value for a blank address or ID from the associated field in the page ticket. If the field is blank in the page ticket, the AMR value will be used.

This enhancement can help address the challenge of having a limit of 10 Transmit Scripts per account, especially in situations where any of 10's or 100's of people can potentially be On-Call. The prescription in this case will be to define a generic Transmit Script in the account for the following destinations: Email, Alpha/SMS and Secure Delivery, and leave the address and ID fields blank. Then, for any particular contact method, attach a page ticket to the message, put the appropriate Transmit Script ID in the 'Type' field of the page ticket, and fill in the requisite target address or ID.

For example, if '1' is the Transmit Script ID for email, a hypertext command like the following would be used:

```
R110E1bobv@telescan.net
```

If '2' is the Transmit Script ID for Secure Delivery, a hypertext command like the following would be used:

```
R210Hbobv
```

**Note** that this feature can also handle situations where a supervisor is to be notified in addition to the on-call person. The supervisor can be notified from a second step within the script, presumably with the destination address or ID pre-filled for the supervisor in the second step definition.



## Updated Hypertext Commands

The following variants have been added to one of the speed dial commands. The first variant allows you to send tones out an inbound call. The second allows you to display the pop-up dialer.

### *Send Tones out an Inbound Call*

While on an inbound call, the following hypertext command can be used from an information screen to send tones out on the inbound call:

```
{Send tones&&"D>1234"}
```

In this example, the tones are 1,2,3, and 4. When used in other contexts, such as an On-Call contact method, a script decision table or an Information Table, the command would look like the following:

```
&"D>1234"
```

### *Show Dialer Pop-up*

The following hypertext command can be used from an information screen to show the pop-up dialer:

```
{Show Pop-up Dialer&&"D?"}
```

When used in other contexts, such as an On-Call contact method, a script decision table or an Information Table, the command would look like the following:

```
&"D?"
```

### *Access Master Account from Sub-Account*

Three existing commands have been enhanced to allow them to be used in new contexts. For example, the following information screen hypertext command:

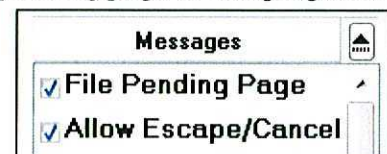
```
{Go to House Account&D1234}
```

will display account 1234. Variants are command codes 'd' and 'G' (eg. d1234 and G1234). It is now possible to leave the account number off of these commands, in which case the current master account will be displayed. This new syntax could be used in a command accessed from a mnemonic, for instance, if it is desirable to go to the current master account regardless of which sub-account is currently on display.

## New Operator Capabilities

You can now enable or disable individual operators from either filing a pending page or escaping from a message. By 'filing a pending page', we mean pressing FILE while in the 'Tracing Page' state. The two new capabilities are under the 'Messages' pull down list on the *Edit ID's Capabilities* tab.

As preparation for using the 'Allow Escape/Cancel' capability for individual operators, first check the 'Allow All ...' checkbox on the 'System Options' tab of the 'System Configuration'. Then proceed to establish the desired capability for each operator. Finally, uncheck the 'Allow All ...' checkbox. This will allow the operator capability setting to have effect.



**Allow All to Escape from Messages**

## Call Escalation when on Operator Hold

The Enhanced Call Routing feature can be used to dynamically alter the priority and assigned stations for inbound calls based on how long they have been in queue, either ringing, listening to an announcement or on hold after an announcement. This feature has been augmented to allow escalation to take place when the call is placed on hold by an operator.

To enable the new escalation state, check the checkbox on the 'Service Classes' tab of the 'System Configuration' window.

Escalate OPR-HOLD Calls

## Enable or Disable Voice Logging per-Account

You can now enable or disable voice logging on a per-account basis. This new feature is conditioned on the Agent controlling the start and stop of voice logger recordings, rather than Prism.

A new checkbox is on the 'Msg Entry' tab of the AMR, as depicted at right. By default, an account is enabled. Check the 'Disable Voice Logging' checkbox to disable voice logging for the account.

Disable Voice Logging

When a call would normally be recorded, the icon at right will be displayed below the call timer on the Agent screen when voice logging has been disabled. Attempts to playback the recording for a message on an account that has been disabled will result in a 'Recording Not Found' response.



If the R2-14 version of Prism is running, the 'Voice Logger Notify Tone' will also be disabled if voice logging has been disabled for an account.

## Outbound Caller ID Override per-Account

The Prism and Agent were recently enhanced with hypertext commands that provide the ability to override the outbound caller ID when placing a call. If such a hypertext command is used to override the caller ID, the override will remain in effect until the screen is cleared or a new account is displayed or a new hypertext command sets a new override.

With this update, the default outbound caller ID override can be established automatically based on the account being displayed. This is done with the use of a new AMR field: 'Outbound Caller ID'. The new field appears on the 'Basic Info' tab of the AMR.

Outbound Caller ID **[314] 426-7662**

When an account is displayed that provides a default caller ID override, an indicator will appear on the Agent screen in the area to the right of the call status window.





## Dropped and Abandoned Call Processing Enhancements

A new capability has been added that will enable the system to auto-generate a message with a page ticket for a dropped or abandoned call. The page ticket will be put on the 'Incomplete' stack of an operator with dispatching capabilities.

- The auto-generated message will have the text 'NO MESSAGE' in the FOR field and will have the same format as an abandoned call ticket. The first line of the message area will contain the Caller ID in a format that can be speed dialed by the dispatching operator. If the Caller Name is available for the inbound call, it will be displayed on the second line of the message area.
- The page ticket will contain the text 'INBOUND CALLBACK' as its FOR field. All other fields of the page ticket will be blank.
- Inbound calls that qualify are calls that are abandoned by the caller during the ring, announce, or announce-hold state. A call answered by an operator, but for which no action had been taken by the operator when the caller hung up, will also qualify.

This feature can be helpful for certain types of accounts, for instance the capture of sales leads during an advertising campaign that is generating heavy call volume.

### *Enabling the Feature for an Account*

One of the following letter codes must be in the 'Auto-Enter Mode' field for the feature to be enabled. This field is on the 'Msg Entry' tab of the AMR. Note that the creation of the message and page ticket is not immediate. It will be delayed for a specified number of minutes based on the chosen letter code. The following letter codes are used:

- I 2 minute delay
- J 5 minute delay
- K 10 minute delay
- L 15 minute delay
- M 20 minute delay

While a callback is pending, if another call from the same caller ID for the same account is received, the pending callback is canceled. If the second inbound call is also dropped, the process repeats until either an inbound call for the caller is answered and processed or the call back is made.

### *Filtering-out Callback Messages from a Scheduled Transmission*

Since the callback messages are formatted as 'NO MESSAGE' tickets, they can be filtered out of scheduled message transmissions by using a Transmit Script. Be sure to uncheck the 'No Message Calls' checkbox in the filter for the destination step in the script.

### *Exceptions based on the Caller ID*

It may be desirable to exempt certain caller ID's from receiving callbacks. For this reason, a new section has been added to the 'System Options' tab of the 'System Configuration' window. Make an entry for each 10-digit caller ID that is to be exempted from receiving a callback.

Inbound Callback Exception List	
3144267662	✓
3145550123	
	▼

## Inbound Message Handling Enhancements

### *Auto-File of Inbound SMS or Email*

Some client applications require that all inbound messages be dispatched, for instance an automated SMS or email from an equipment monitor. To facilitate the handling of such an account, an AMR field can now be configured to cause an inbound message for the account to be automatically filed in the 'Undelivered' list with a page ticket attached. The page ticket will be given as 'Incomplete' work to a dispatcher. This saves a step for the operator and minimizes the chance for mishandling the inbound message.

The new AMR field is labeled 'Inbound Msg Dispatch Mode'. (It formerly was a checkbox labeled 'Disable Inbound Msg AutoXmt/Page')

Inbound Msg Dispatch Mode

The settings for the field are now:

- Blank to enable manual paging or other automated transmission of the inbound message.
- 'P' to auto-file the inbound message (from SMS or email) and attach a page ticket for a dispatcher. This is the new mode described above.
- Any other non-blank character to disable auto-transmit or page ticket processing for an inbound message. In this case, the operator simply files the inbound message.

The current setting in this field will be back-compatible after updating the software. It will either be blank (option 1) or contain a 'Y' (option 3). In prior versions, the 'Y' corresponded to the checkbox being checked, thus disabling auto-transmit and page ticket processing for inbounds.

### *Routing Unsolicited Inbound Email to an Operator*

A new checkbox has been added to the Email Server's 'Internet Information' page. It is located near the 'Admin Email Address' and 'SDM Account' fields.

Include unsolicited

If this checkbox is checked, unsolicited inbound email will be routed to a dispatcher. The system will associate it with the account number specified in the 'SDM Account' field.

Note that this feature can be used even if the 'Admin Email Address' is blank.

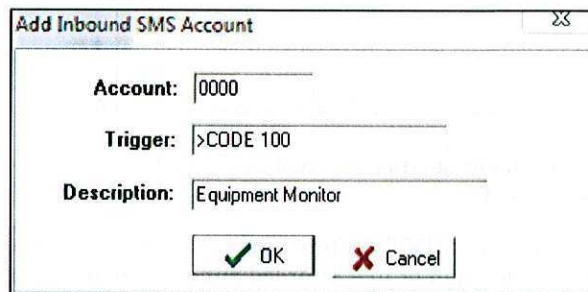


## Inbound Message Handling Enhancements

### *Routing an Inbound SMS based on part of the Message Content*

You can now associate an unsolicited inbound SMS with an account based on matching a piece of the content of the inbound message. This can be useful in an application where part of the inbound messages will always be the same, but the phone number that originates the messages cannot be predetermined.

Below is the new 'Add Inbound SMS Account' window. The second field was formerly labeled 'Phone'. You can still put a phone number in this field, but alternatively, you can enter some text to search for in the inbound message. To indicate that the 'Trigger' field contains text to search for, put a 'Greater Than' sign (>) as the first character in the field, followed by the text for which to search. The text can be up to 20 characters long. For example:



The screenshot shows a dialog box titled "Add Inbound SMS Account". It has three input fields: "Account:" with the value "0000", "Trigger:" with the value ">CODE 100", and "Description:" with the value "Equipment Monitor". At the bottom, there are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

If 'CODE 100' appears in the message, it will be accepted on account 0000.

### *Further Refinements to Inbound SMS Routing*

The SMS Server can be configured to save copies of outbound messages for up to 4 hours. If during that time, an inbound message is received, the account to associate the inbound message with can be determined from a prior 'saved' message sent to that phone. This obviates the need to build every client's phone number into the 'Inbound Accounts Table' if they would only ever respond to messages that you send them. But in prior versions, if the phone number had been entered in the 'Inbound Accounts' table, the associated account would always be pulled from the table and not from the last message sent to the phone. This made it problematical to use both approaches for a client who received messages from more than one account to the same phone.

With this update, the SMS Server's approach has been refined such that if a prior sent message is still available for the phone number, the account number for that message will be used when routing the inbound message to an operator, even if the phone number also exists in the 'Inbound Accounts Table'. In this latter circumstance, only the 'Description' field will be used from the table.

With this update also, the system will attempt to route an inbound response message from a client to the operator that took the original message. This would only be done if the operator had some form of dispatch capability (including 'OWN') and no other operator had a page pending for the account.



## New Spectrum Chart—Inbound Service Level

A new chart set has been added to Spectrum Charts. It is titled 'Inbound Service Level' and shows agent performance relative to a target answer time for inbound calls. In addition, two companion charts are provided that give insight into other related performance metrics, these being the total queue and talk time for the calls, as well as agent work time, idle time and break time for the period being examined.

### Spectrum Charts

User ID:    Password:

**Chart:**  
Inbound Service Level

**Get Chart**

**Start:**  
09-03-2014 12:00 am

**End:**  
09-04-2014 12:00 am

**Frequency:**  
15 minutes

**Target Answer Time:**  
18 seconds

**Dropped Call Threshold:**  
12 seconds

**Service Classes:** Filter

**Client Classes:** Filter

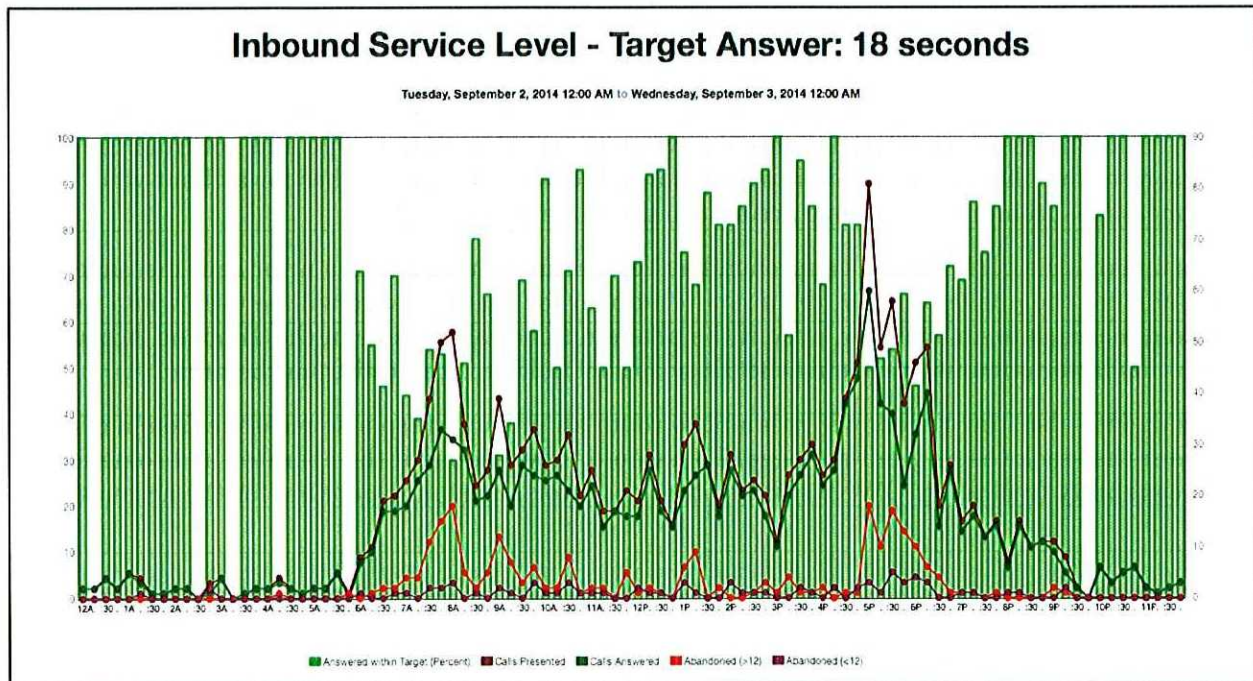
**Agent:** Filter

Allow DataOnly Agents

Filters are provided to set the time frame and frequency of the sampling. Two other filters set the desired 'Target Answer Time' and the threshold for determining a 'dropped' call. The Service and Client class filters let you restrict the measured traffic to certain subsets of your client base. The Agent filter affects only the 3rd chart in the set, which shows how agent time was utilized.

Below is a sample chart showing performance against a target answer time of 18 seconds. The green bars show a percentage of calls that were answered within the target answer time. The four line graphs show the following:

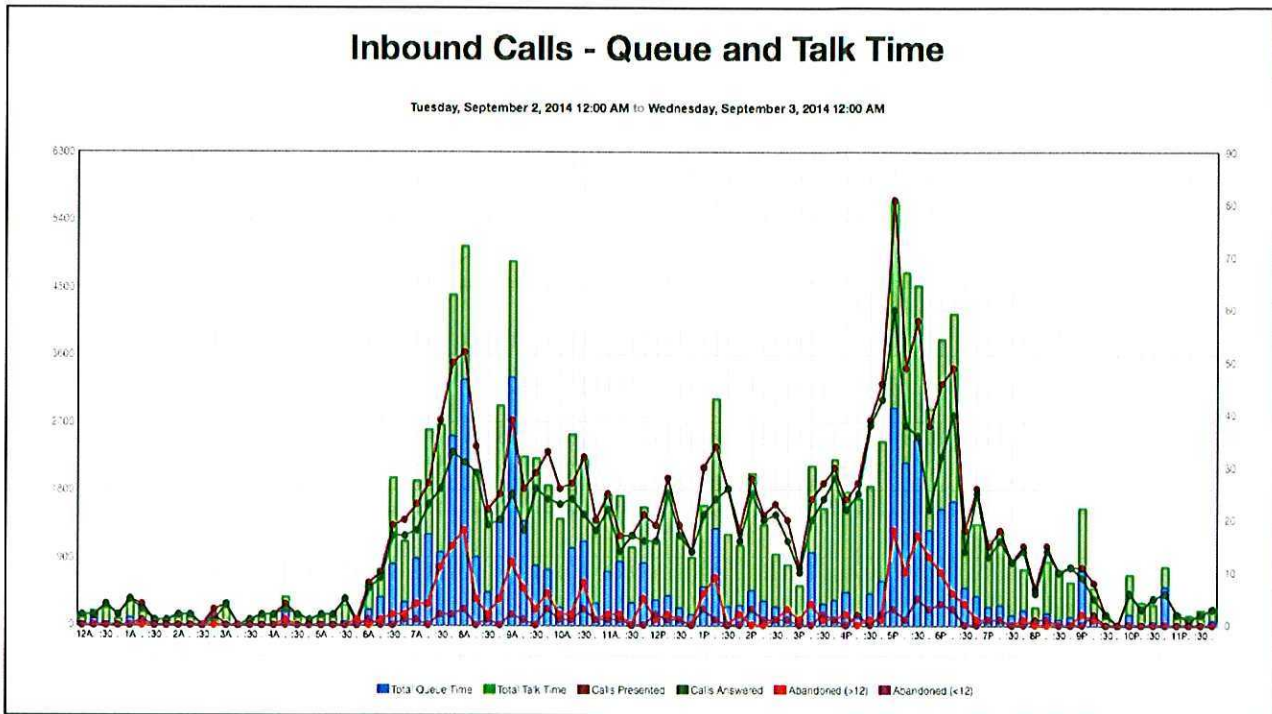
- Calls Presented—the number of inbound calls that were made available to an operator to answer. These do not include calls that went directly to voice mail or to a recorded announcement during which the caller hung up.
- Calls Answered—the number of calls that had 'talk time'
- Abandoned > 12—the number of dropped calls during which the caller hung up after waiting in queue longer than 12 seconds (or whatever was established as the 'Dropped Call Threshold').
- Abandoned < 12—the number of dropped calls during which the caller hung up after waiting in queue less than 12 seconds (or whatever was established as the 'Dropped Call Threshold').



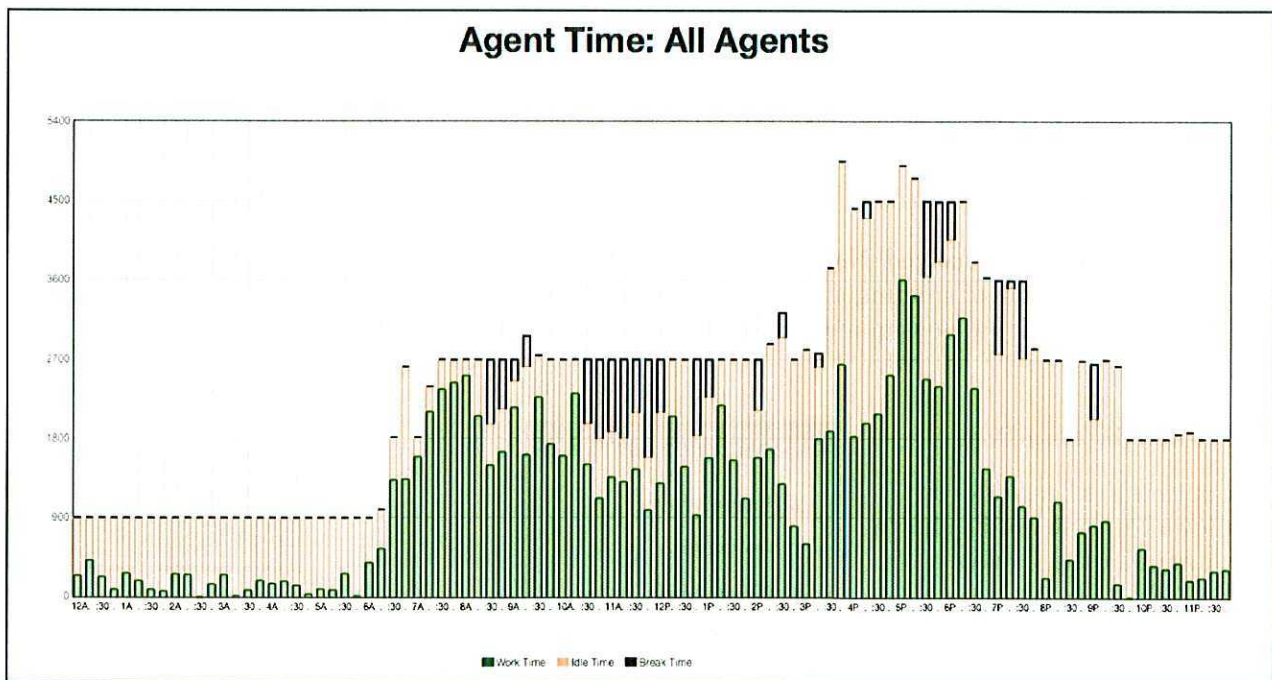


# New Spectrum Chart—Service Level Analysis

The first companion chart shows the total queue time (blue) and the total talk time (green) during the sampled periods. The four line graphs are repeated from the prior chart.



The second companion chart shows how agent time was distributed during the sample periods between work time (green), idle time (tan) and break time (black). Idle time is time in 'Standby' when not on an inbound or outbound call. Work time consists of all non-idle and non-break time. This chart can be filtered to show only one or a subset of agents.



## Secure Delivery Enhancements

### *Escalate Notification after a Specified Time*

Secure Delivery offers several options for notifying the client when a new message is ready, including native notification, SMS, Email and Alpha Page. When a client is running the Secure Delivery App, the native notification may be all that is needed, but it is sometimes desirable to also notify the client by one of the other methods.

With this update, you can defer using one of the other notification methods (SMS, Email and Alpha) until a specified period of time elapses, after which, if the message is still 'Undelivered', the system will send the alternative notifications. A new field in the client setup window has been added for this purpose.

Notification for Message	Note	
Secure Delivery App <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	For Undelivered Msgs: Try methods below after <input type="text" value="0"/> minutes
SMS <input checked="" type="checkbox"/>	<input type="checkbox"/>	Mobile Number <input type="text" value="3145551212"/>
Alpha <input checked="" type="checkbox"/>	<input type="checkbox"/>	TermlD:PagerID <input type="text" value="1:3144267662"/>
Email <input checked="" type="checkbox"/>	<input type="checkbox"/>	Email Address <input type="text" value="bobv@telescan.net"/>

The time range can be 1 to 9 minutes. If the field is 0 or blank, then the alternative notifications, if any, are sent immediately.

If native notification (Secure Delivery App) is not checked, then the option for deferring the other methods is not displayed. In this case also, the alternative notifications, if any, are sent immediately.

This feature only applies to messages, not 'Notes'.

### *Forward a Received Note*

The recipient of a Note now has the option of forwarding the Note to one or more other clients. The new option is available in the menu shown when a 'received' Note is tapped.

Mark as Read?	
<input checked="" type="checkbox"/>	Yes
<input type="checkbox"/>	Yes, with Comment to Note
<input type="checkbox"/>	Yes, with new Note
<input type="checkbox"/>	Yes, and Forward Note
<input type="checkbox"/>	No, but Comment on Note
<input checked="" type="checkbox"/>	Not now

### *Notify Sender Only*

When commenting on a 'received' Note that has more than one recipient, you now have the option of sending a notification only to the original sender of the Note. An additional pop-up menu will be shown before proceeding to enter the comment.

Only Notify Sender?	
<input checked="" type="checkbox"/>	Yes, Only Notify Sender
<input type="checkbox"/>	Notify all Recipients

### *Show Notes for One Day*

A new option has been added that allows Notes to not be shown if they are older than 1 day.

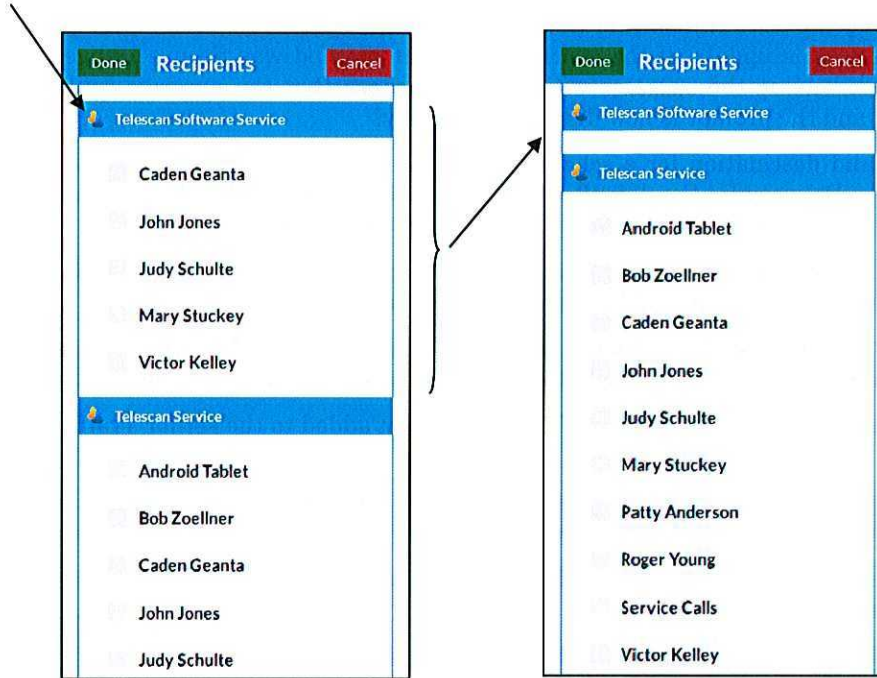
Notes	
<input checked="" type="radio"/>	Show for 1 day
<input type="radio"/>	Show for 3 days
<input type="radio"/>	Show for 7 days
<input type="radio"/>	Show for 30 days



## Secure Delivery Enhancements

### *Group Selection for Recipients*

On the page used for selecting recipients of a Note, an icon has been added to the header for a group list. By tapping on this icon, the user can alternately expand and contract the group list.



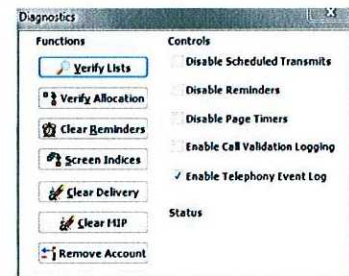
By tapping on the group name, the user can alternately select and de-select the entire group.



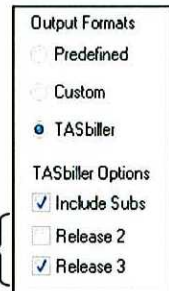
## Changes and Corrections

### Spectrum Data Manager

1. Recently a feature was added to allow a 'Force Disconnect' to be performed on an Agent station from SDM. A correction was made to this feature to properly handle the case where the station was left in the 'Signing-On' state.
2. When overriding the auto-transmit of a message, the operator can optionally be prompted to confirm the override. Prior to this update, if the override transmit method was Secure Delivery, the prompt was not being displayed, leaving the operator with the appearance that the message could not be filed. This has been corrected and the prompt is now displayed properly.
3. 'H' is now a valid destination for a scheduled transmit. It will cause the specified list of messages to be posted to Secure Delivery for the default Client ID of the account as specified on the 'Mst Dest' tab. A single notification will be sent to the client if at least one message is posted.
4. When extracting information screens from the active database or from a backup, SDM will now remember the previous output folder when making a new extraction.
5. When viewing a client's Secure Messages from the SDM viewer, the 'Message Recipient Actions' are now shown. This mimics how they are shown to the client through the Secure Delivery App.
6. In Spectrum Charts, the 'Signed-In Time' chart has been added to the set for Traffic Analysis of Day-of-the-Week data.
7. A cosmetic change was made to the Spectrum Charts filter section. The label for the 'Day of the Week' pulldown list was not being positioned properly in all browsers. This has been corrected.
8. The filtering of agent ID's in Spectrum Charts now handles special characters in the ID's, such as #, @, etc., as well as 1 and 2 character ID's.
9. The 'Tools' - 'Diagnostics' window has changed. The two obsolete timezone diagnostics have been removed, and a new checkbox has been added that enables a 'Telephony Event Log'. The new log will improve the diagnosis of issues related to telephony. Unlike the other checkboxes on the 'Diagnostics' window, the 'Telephony Event Log' setting will be retained across a restart of Spectrum Data Manager. To facilitate access to this log, which is maintained as separate daily logs, a new option has been added to the 'View' 'Logs' 'Files of Type' menu: 'Telephony Events'.
10. For 'No New Messages' emails, the email body will now contain the account name, account number and a date and timestamp.
11. A new formatting option has been added for extracting account totals for import into TASbiller. To better clarify the available options, one checkbox was renamed and another added to the 'TASbiller Options' section.



- The 'Release 2' checkbox will produce output in a format like the former 'All Fields' option from prior versions of SDM.
- By checking 'Release 3', all totals will be included in the output.



### Secure Delivery

1. The latest Secure Delivery App for iOS and Android has a new color scheme and 'flatter' buttons.
2. In the Secure Delivery App, any pop-up dialog box left on display is now guaranteed to be cleared when returning to the App.
3. 'Notes' are now ordered by last time modified instead of time created. This will keep all active 'Notes' at the top of the list.



## Changes and Corrections

4. A correction was made to the Android App. The alert tone will now be silenced properly when the App is entered.
5. Minor corrections were made in the iOS App pertaining to the formatting of a 'Note' and to the formatting of a message list after exiting the 'View' mode on a selected message.
6. A correction was made to the presentation of a Note to the service when the Note contains hyperlinks.

### Communications Server

1. The SMS Server now allows the phone number associated with an inbound message to be as short as 3 characters.
2. The Alpha Server will now handle the rare case where a job file has no associated data file. The orphan job file will now be deleted. Prior to this change, this condition would cause subsequent jobs to be held in the 'Ready' queue and not be processed.
3. When examining a source or target email address for an inbound email, the Email Server will now trim leading and trailing spaces from the address, if present. Prior to this change, a leading or trailing space would cause the address not to find a match in the 'Inbound Accounts' table.
4. The SMTP connection timeout has been restored to its previous (longer) duration. It had been shortened in the prior update, which caused slow responding connections at some sites to fail. In addition, a 'Pause SMTP' button has been added, to allow outbound email to be temporarily held while reconfiguring a connection.
5. The Email Server log will record the last response from the SMTP server when a transmit error occurs, which is useful when diagnosing connection or timeout errors. The label for this response in the log has been changed to 'Last Reply from SMTP Server'.

### Agent

1. An improvement was made to the handling of Agent Metrics. The Agent program will now guarantee that a valid operator ID has been accepted by SDM and synced with the Agent before metric data will be uploaded. This was done to handle the case where the Agent program is stopped and restarted without signing-off. In this circumstance, there was a window of time after restarting during which the Agent program did not know the operator ID that last signed on to the station.
2. The pop-up menu for the Windows Menu/Apps key has been replaced with an improved version. The new implementation is functionally the same as the prior, but the menu is slightly larger and works in versions of Windows that the prior implementation had problems with.
3. A correction was made to the Agent Report for Operator Statistics. Some calls with less than a second of ring or announce time were erroneously counted as being taken Off Hold.
4. The timeout handling when placing a call to Prism for SIP audio has been enhanced to allow for operation with SIP servers that require longer than two seconds for the call to be established.
5. If the Agent station uses SIP audio and is configured to 'Disconnect on Sign-Off', the Agent will now also disconnect from the SIP server.

### On-Call Editor

1. A correction was made to the 'Copy Contacts' function. It now properly copies contact methods that contain commands that reference an Information Table, as well as Dial commands that override the Caller ID.
2. The 'Import' button has been restored to the toolbar.
3. The ending date for an 'Always On Call' assignment has been changed to Dec 31, 2019. Prior versions set the ending year to 2099, which caused issues with the Web Messages application.

