Portrait
Foundation

Using the Contact Centre Workspace - Adding Contracts and Products

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Pitney Bowes
Software

Portrait Foundation
Using the Contact Centre Workspace - Adding Contracts and Products

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About this document

Purpose of document

This document is intended to provide information that will allow a Portrait configurer to implement a solution, based on the *Contact centre workspace.*

The *Contact centre workspace* provides functionality that will allow the user to log on to a contact centre application and attempt to take a call.

This document does not provide the information necessary to *build* the solution components or create the appropriate install.

However, the build process must be performed before it is possible to run the configuration described in this document, and is described in the Foundation SDK user guide.

Intended audience

This document is intended to be used by configurers and developers involved in creating a Portrait serviced application e.g. branch, contact centre.

Related documents

Software Development Kit User Guide *(Foundation SDK User Guide)*

Using the Contact Centre Workspace Overview

Software release

Portrait Foundation 4.2 SP1 or later.

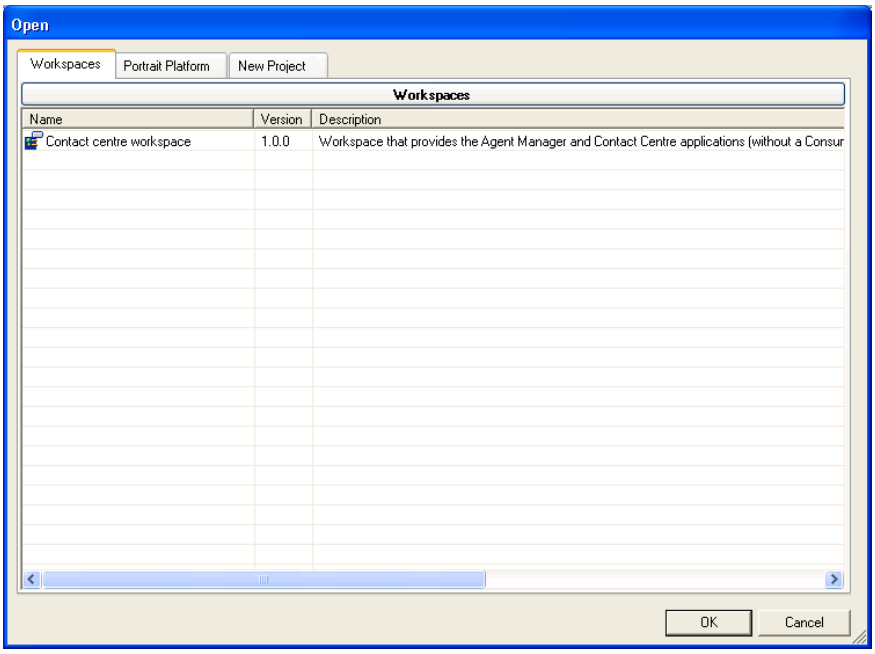
Contents

1 Introduction

1.1 The Contact centre workspace

This document is based on the premise that your implementation will evolve from a primitive workspace that is provided as part of a standard Portrait installation.

This is called the *Contact centre workspace* and it will appear on the workspaces tab in the repository browser when your repository has been created.



Unlike packages, workspaces are **all** *owned* by your project/implementation. In this context, *ownership* determines whether you can modify the content of configuration objects in addition to extending and overriding them.

1.2 Functional overview

The assumption is that your starting point was the *Contact centre workspace.* This workspace does not include any support for defining contracts or products. If an implementation's business needs indicate that these entities are required some supporting packages are provided in the Portrait Platform repository.

The packages in question are not transferrable.

2 Using this document

2.1 Checklist

You should print the Checklist provided in Appendix A - Integration Checklist.

This will provide you with a summary of all the high levels steps you need to consider in order to integrate a party definition into your workspace.

The checklist contains a *Done* column so that you can check off the items completed.

2.2 Indication of mandatory/optional steps

The checklist provides a summary of mandatory steps and optional steps. Clearly, you must complete the mandatory steps before you can use the packaged functionality.

You should review the optional steps carefully in case they provide the opportunity for a better fit with your implementation.

2.3 Nomenclature

Historically, both product and contract were represented as a single entity in Portrait. In release 3.0 service pack 2, Portrait was enhanced so that there are now separate configurable business entities for contract and product definitions.

Unfortunately, this has resulted in a confusing data object category of **Product** for contract which took over the original definition. The data object category for the new definition that was created for product definitions is **ProductDefinition**.

2.4 Starting point

This document assumes that you have already opened your workspace and that your workspace is based on or is the *Contact centre workspace*.

3 Adding product and contract support

If your contact centre implementation is intended to service contracts, you will need to include the relevant packages. These packages provide you with the opportunity to configure product and contract definitions as well as providing some basic utilities for manipulating contracts.

Specifically, the package provides functionality that will allow users during an engagement to browse and view contracts.

3.1 Include packages

3.1.1 Contracts package

Ensure that the *Product utilities* (category Supporting utilities) package is included in the implementation's workspace either directly or indirectly. To add this package if not already included undertake the following steps: -

1. Right click on *Included packages* in explorer view and select **Add package...**.
2. *Add* dialog will appear. Select the *Portrait Platform* tab then *Supporting utilities* shutter and select the *Product utilities* package.
3. Select **OK**.

3.1.2 Products package

The *Product definition* package contains the basic functionality for the definition of *Product definition* CBEs and views including supporting data access transactions. No views have been implemented for either the serviced and self service Portrait applications. However, a separate application for end users to maintain products instances is provided i.e. *Product Manager*.

Ensure that the *Product definitions* (category *Supporting utilities*) package is included in the implementation's workspace either directly or indirectly. To add this package if not already included undertake the following steps: -

1. Right click on *Included packages* in explorer view and select **Add package...**.
2. *Add* dialog will appear. Select the *Portrait Platform* tab then *Supporting utilities* shutter and select the *Product definitions* package.
3. Select **OK**.

3.2 Generic side bar custom control mappings

Any new or existing contract operations rely on the operation availability criteria having been mapped in the **Generic side bar** custom control. This is normally undertaken in the *Contact centre workspace* and an overlay will already have been created.

1. Locate and check out the *Generic sidebar* custom control (*User interface\Custom controls* folder).
2. Right click and from the context menu select **Map model parameters...**.

3 The *Map custom control* dialog will appear. Map the following inputs:-

ApplicationContext>ContractOperations_Criteria.ApplicationContext.CriterionValue

Channel>ContractOperations_Criteria.Channel.CriterionValue

SelectObjectCategory>ContractOperations_Criteria.SelectObjectCategory.CriterionValue

SelectObjectContext>ContractOperations_Criteria.SelectObjectContext.CriterionValue

SelectObjectStatus>ContractOperations_Criteria.SelectObjectStatus.CriterionValue

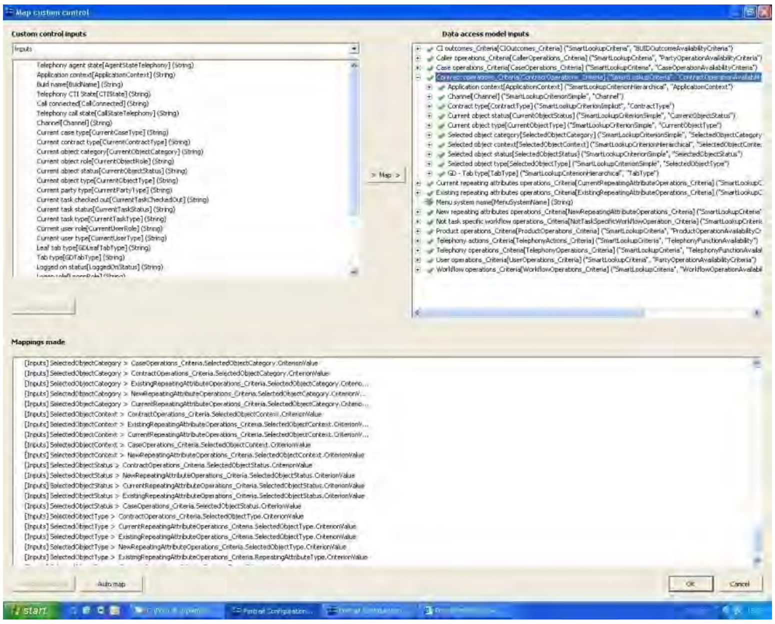
SelectObjectType>ContractOperations_Criteria.SelectObjectType.CriterionValue

GDTabType>ContractOperations_Criteria.TabType.CriterionValue

CurrentObjectStatus>ContractOperations_Criteria.CurrentObjectStatus.CriterionValue

CurrentObjectType>ContractOperations_Criteria.CurrentObjectType.CriterionValue

SelectedObjectType>ContractOperations_Criteria.ContractType.CriterionValue



4 Validate.

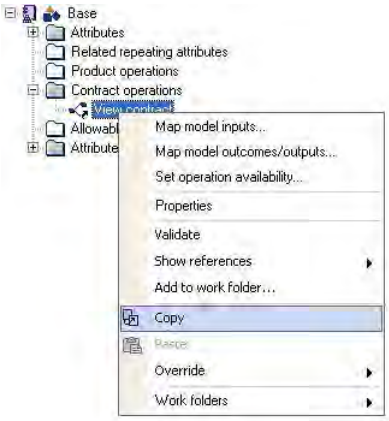
5 Check in and publish.

3.3 View contract menu item

An operation to view a contract needs to be added to the workspace.

1 Locate and check out the *Contact centre sidebar* menu (*User interface\Menu* folder).

2 Right click and select **New→Sub-menu**. Add the *Contract* sub menu as shown below:

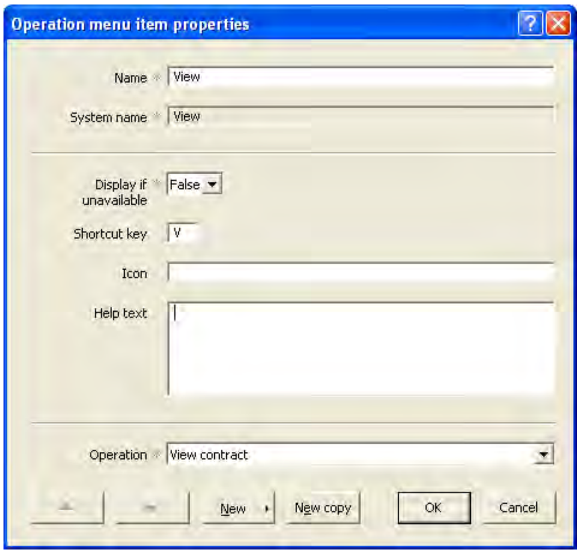


3 Locate and open the *Base* CBE definition (*Products and Contract/Contract definitions* folder). Right click and select **Open item**.

4 Expand *Contract operations* and select *View contract* operation. Right click and select **Copy** from context menu.

5 Expand **Contact centre sidebar** and select Contract sub menu created in step 2. Right click and select **Paste as→Operation menu item** from context menu.

6 Name the menu item *View* and select **OK**.



7 Validate.

8 Check in and publish.

3.4 Product CBEs

Product definition CBEs (category system name is *ProductDefinition*) support inheritance.

It is assumed the readers of this document will be familiar with entity relationships and will be familiar with the creation of Portrait CBE definitions.

The implicit reference data group for product definitions is *Product definitions*.

3.5 Contract CBEs

Contract CBEs (category system name is *Contract*) support inheritance. A base definition is supplied in the *Product utilities* package i.e. *Base* (system name is *BaseProduct*).

It is assumed the readers of this document will be familiar with entity relationships and will be familiar with the creation of Portrait CBE definitions.

The implicit reference data group for contracts is *Products*.

3.6 Contract views

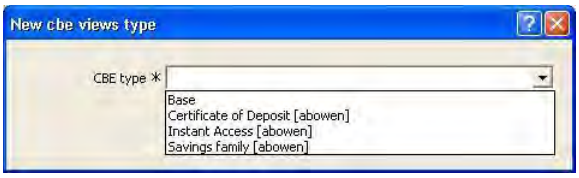
Projects have the option of implementing some standard contract views. The configuration for these views can be undertaken in a project's specific package where the contracts CBEs have been defined. This package will need to include the **Products** (Supporting utilities) package either directly or indirectly.

CBE views do not inherit parent definitions.

3.6.1 Contract CBE view

1 Locate and check out the *Contract view folders* menu (*User interface\ Views* folder).

2 Right click on *Contract view folders* and select **New contract views folder…** from the context menu. The *New cbe views type* dialog will be displayed.



3 Select the CBE type that you wish to create a view for.

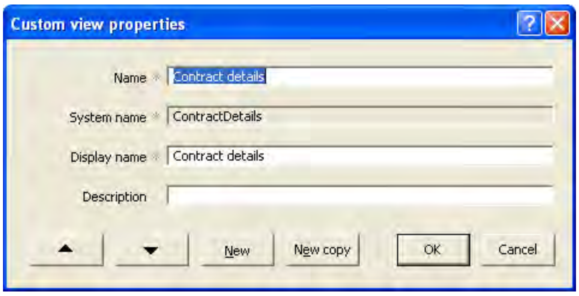
4 Select **OK**.

3.6.2 Contract details

A standard view is provided to display contract details. It is a generated view that enables a project implementation to configure the attributes that they wish to display for each individual leaf definition.

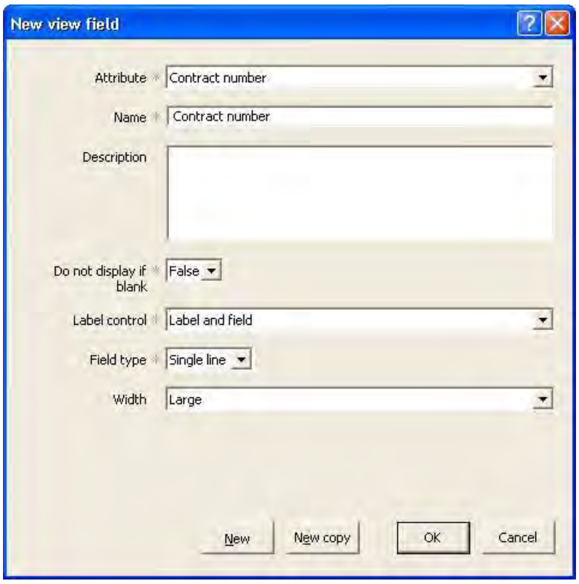
5 Locate the contract CBE view that you created in 3.6.1 right click and select **New custom view…** from the context menu.

6 The *Custom view properties* dialog will be displayed. Name the view *Contract details* the *Display name* is what will be displayed on the tab.



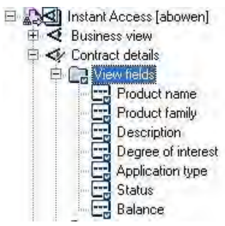
7 Expand this new view and select *View fields* right click select **New view field...** from the context menu.

8 The *New view field* dialog will be displayed. Select the attribute that you wish to be displayed and select the appropriate presentation definition. The value of *Name* is what will be displayed as the label.



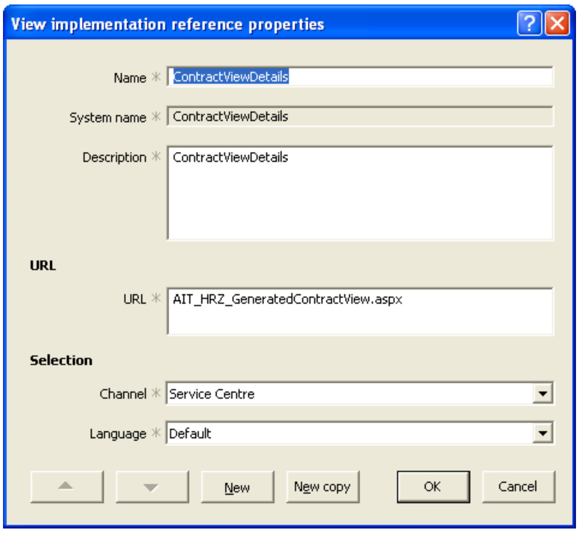
9 Select **OK**.

10 Repeats steps 5 to 9 for each attribute that you wish to be displayed.



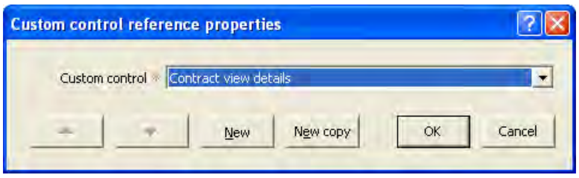
11 Expand this new view and select *Implementation references* right click select **New view implementation reference...** from the context menu.

12 The *View implementation reference properties* dialog will be displayed. Ensure the URL references AIT_HRZ_GeneratedContractView.aspx.



13 Select **OK**.

14 Select the *implementation reference*, right click and select **New custom control reference…** and ensure that the *Contract view details* custom control is referenced.



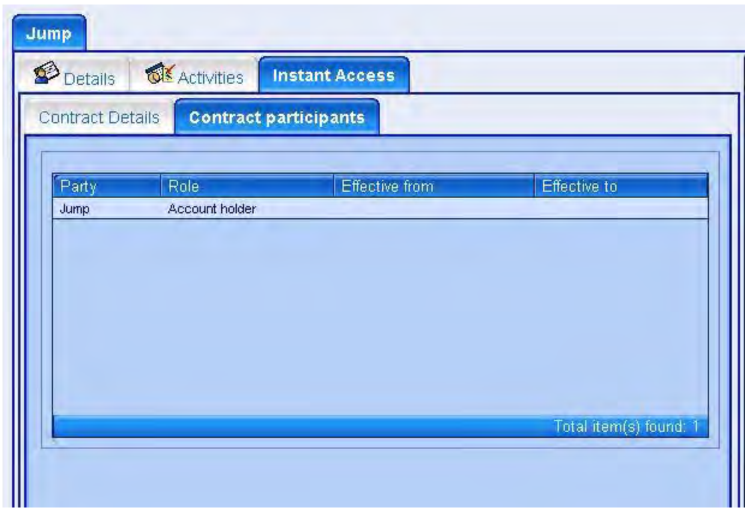
15 Select **OK**.

16 Validate.

17 Add to source control and publish.

3.6.3 Contract participants

A standard view is provided to display contract participants. It is a custom view that displays pre-defined column values.



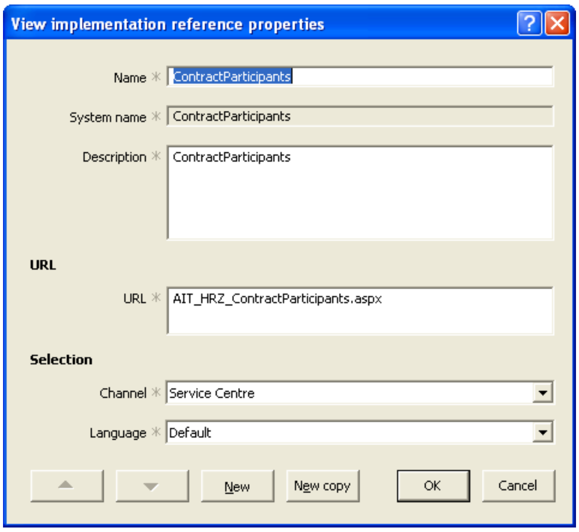
1 Locate the contract CBE view that you created in 3.6.1 right click and select **New custom view…** from the context menu.

2 The *Custom view properties* dialog will be displayed. Name the view *Contract participants* the *Display name* is what will be displayed on the tab.

3 Select **OK**.

4 Expand the view and select *Implementation references* right click select **New view implementation reference...** from the context menu.

5 The *View implementation reference properties* dialog will be displayed. Ensure the URL references AIT_HRZ_ContractParticipants.aspx.



6 Select **OK**.

7 Select the *implementation reference*, right click and select **New custom control reference...** and ensure that the *Retrieve Contract Participants* custom control is referenced.

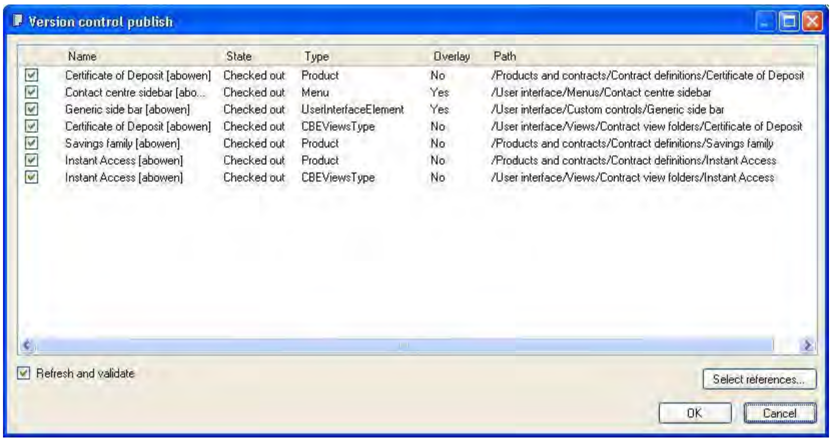
8 Select **OK**.

9 Validate.

10 Add to source control and publish.

4 Publish and Deploy

You should publish all the configuration changes that have resulted from the steps described in this document and then deploy the changes into a suitable database.



Before you can run the integrated functionality it will be necessary to create a suitable Portrait installation using the Portrait Build Kit. (See **Error! Reference ource not found.**.)

Appendix A Integration Checklist

This appendix should be printed so that the integration steps can be checked off. The checklist identifies the high level steps, each of which will contain several details steps.

You must complete the detail steps in the order indicated in the document. It is recommended that you complete the high level steps in the order indicated in this appendix. However, more experienced users will recognise that this isn't always necessary.

A.1 Mandatory steps

You must complete the following high level steps before you can use the packaged functionality.

Check the detailed steps carefully, they are not all mandatory.

Step	Description	Page	Done
1.	Add packages	3	
2.	Custom control mappings	8	
3.	Publish and deploy	15	
4.	Test	-	

A.2 Optional steps

The following steps allow you to customise/extend your implementation further. If you undertake any of the steps you must complete the detailed steps as indicated in the document. **Do not partially complete an optional step**.

Step	Description	Page	Done
1.	Contact centre menu item	9	
2.	Add contract views	11	