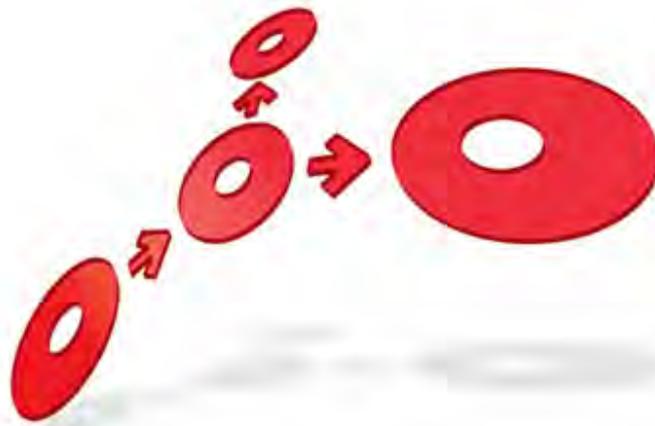# Portrait
Foundation

Demonstration Components
User Guide

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PitneyBowes
Software

Portrait Foundation
Demonstration Components User Guide

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Portrait Software enables organizations to engage with each of their customers as individuals, resulting in improved customer profitability, increased retention, reduced risk, and outstanding customer experiences. This is achieved through a suite of innovative, insight-driven applications which empower organizations to create enduring one-to-one relationships with their customers.

Portrait Software was acquired in July 2010 by Pitney Bowes to build on the broad range of capabilities at Pitney Bowes Software for helping organizations acquire, serve and grow their customer relationships more effectively. The Portrait Customer Interaction Suite combines world leading customer analytics, powerful inbound and outbound campaign management, and best-in-class business process integration to deliver real-time customer interactions that communicate precisely the right message through the right channel, at the right time.

Our 300 + customers include industry-leading organizations in customer-intensive sectors. They include 3, AAA, Bank of Tokyo Mitsubishi, Dell, Fiserv Bank Solutions, Lloyds Banking Group, Merrill Lynch, Nationwide Building Society, RACQ, RAC WA, Telenor, Tesco Bank, T-Mobile, Tryg and US Bank.

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Portrait SOFTWARE™

About this document

Purpose of document

This document describes how to use the components that have been developed to simulate areas of Portrait functionality that usually depend on third-party software.

Intended audience

Individuals wishing to use the Portrait demo components.

Related documents

Installation Guide

Software release

Portrait Foundation 4.4 Update 3 or later.

Contents

1   Introduction

Portrait demo components have been developed to demonstrate functional areas of the Portrait vanilla profile without the overhead of running third-party software.

The functional areas of Portrait that can be exercised using the demo components are:

- **CTI** - a demonstration Portrait Telephony Client (PTC) has been developed to simulate the standard PTC

  Portrait demo CTI will enable the demonstration of telephony within the vanilla Contact Centre without the Portrait Telephony Server and associated third party telephony simulator(s).

- **Simplex Channels** - demo channel integration components have been developed to simulate standard Portrait channel integrations with third-party software.

  Portrait inbound demo post will enable the demonstration of Portrait inbound Post channel integration without the need for third party DMS software.

- **DMS** – The Portrait vanilla profile imaging functionality, previously provided by integrations with third party DMS systems, has been opened to demonstration by the introduction of the Simplex Channel demo components.

  Inbound demo channel integrations enable Portrait to be demonstrated viewing images, triggering events, creating workflow tasks, creating document associations to parties and contracts, returning documents for rescan etc.

2   Using the Demo components

This section describes how to use the demo components to simulate the standard Portrait counterparts.

Some demo components still rely on the use of underlying Microsoft MSMQ software, as with the production versions. The install and configuration of this software is explained in detail in section 3 - Pre-install steps.

The following sections describe in detail the requirements for each demo functional area and, where applicable, any limitations forced by the lack of third-party software.

2.1   CTI

The Demo Portrait Telephony Client (PTC) is a client side JavaScript file that simulates the messages sent to and received from the Portrait Telephony Server in a full telephony enabled environment.

The demo PTC simulates the standard PTC, providing the same operations and **call summary details. Telephony enabled 'Take call' business** processes will be available with one difference; to receive a call an icon must be clicked on the Agent desktop.

Because there is no Portrait telephony server to send messages to the PTC, an incoming call needs to be triggered manually.

As with the standard PTC, the Agent needs to log on to telephony and be made available to receive calls. Clicking the telephone icon that appears in the left hand side of the telephony summary will then simulate the incoming call.
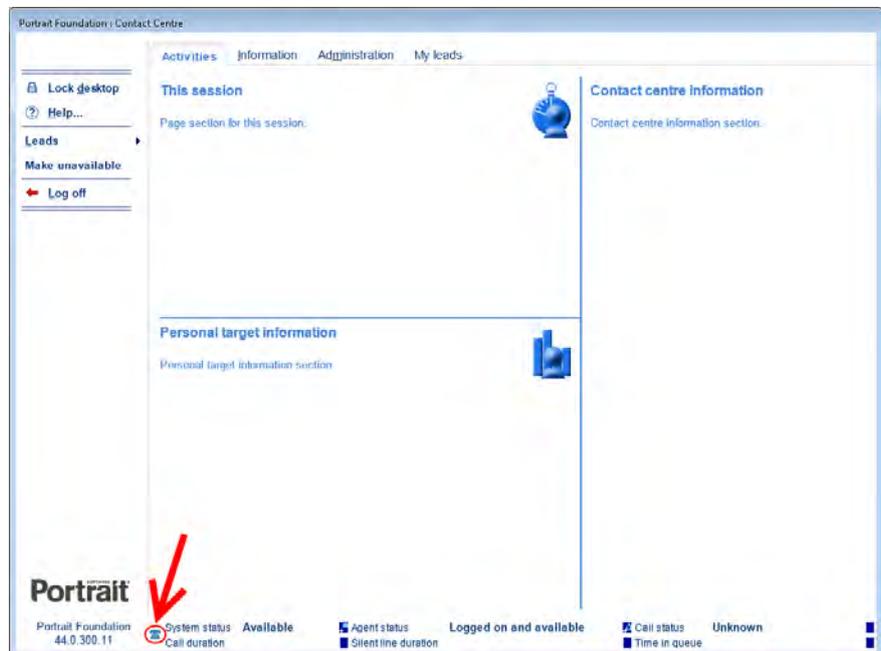
The icon will only be available when the Agent is available to take calls.

Automatic identification is available with the demo PTC, but requires a small change to the telephony.js script file.

The script file can be found in the Portrait_Client\Includes directory, installed under the standard IIS install directory. e.g.
'**C:**\Inetpub\wwwroot\Portrait_Client**Includes**'

Open the demo_telephony.js file for editing and locate the section of script below:

```
// ****************************************************
// **** CHANGE THE PARTY ID TO AUTO IDENTIFY A PARTY *****
var CurrentPartyID = "";
var CurrentPartyType = "Consumer";
// ****************************************************
// ****************************************************
```

Add the **encrypted** party id of the party you want to automatically identify in between the empty "". e.g.

```
// ****************************************************
// **** CHANGE THE PARTY ID TO AUTO IDENTIFY A PARTY *****
var CurrentPartyID = "4HbDZbe7UhZ8BGJ;XioCfNiAAAAAB6pltY";
var CurrentPartyType = "Consumer";
// ****************************************************
// ****************************************************
```

NOTE: An encrypted Party ID can be generated using the Model Diagnosis tool to encrypt the value.

Save the file.

If an agent is currently logged into the Contact Centre, the user should wrap-up any calls, log-out and exit the application.

The next time the user logs-on to the Contact-Centre and the phone icon is clicked, the identify screens is bypassed and the customer desktop is displayed. If authentication has been set on the customer, the authentication dialog is displayed before proceeding to the customer desktop.

Other telephony functionality is available, but there are some limitations forced by the absence of the Portrait telephony server:

Portrait Demo PTC limitations

- Make consult call behaves as expected for the Agent making the consultation but the consulted agent will not be notified.
- Transfer call behaves as expected for the Agent transferring but the Agent taking the transfer will not see the telephony summary details and some operations are not available.
- Make general call behaves as expected for the Agent making the call but the Agent receiving the call is not notified.

2.2 Inbound post

The demo Portrait inbound post component works by polling a directory on the local file system.

When files are added to the directory, they are processed by the Amc DMS Inbound Adaptor service and moved to a destination directory where they are re-named and stored. Data retrieved from the file is sent in an XML structure to an MSMQ queue where the message is received and processed by Portrait

When demo Portrait inbound post components have been installed successfully, you can:

- Send post documents into Portrait.
- View files of supported file types.
- Trigger events that are waiting for documents to be received e.g. Wait for Authorisation Form, Wait for Death Certificate etc.

- Create Workflow tasks based on the document type. E.g. Approve Authorisation Form, Verify Death Certificate etc.
- Associate a document to a Party or Contract.
- Use post channel specific operations. E.g. Send for rescan.
- Automatic association using document properties.

NOTE: Portrait uses the renamed file in the destination directory for viewing, so it is important that these files are not removed from the destination directory while references exist in the Portrait CRM database.

- The viewing of different file types is dependent on software being available on the machine. Most file viewers use Microsoft Internet Explorer plug-ins. These plug-ins are light-weight versions of the associated software and will be automatically installed with the associated software. Where applicable, the following file types will have the required software indicated in brackets.

Supported file types:

- .pdf (Adobe).
- .doc, .docx (Microsoft Word).
- .xls, .xlsx (Microsoft Excel).
- .pps, .ppt, .ppsx, .pptx (Microsoft PowerPoint).
- Image files are supported via a third party image viewer. For more information contact your Product Support helpdesk.

A demo inbound post document can be sent into Portrait with pre-configured properties to simulate barcode reading and enabling automatic association etc. These pre-configured properties need to be stored in an XML structure, saved in a **'.ctrl' file and should be added to the source directory at the same time as the** file that will use the properties.

The Portrait vanilla profile is configured to use a pre-defined set of properties when dealing with post channel documents. To simulate the functionality, the XML in the .ctrl file should contain XML as follows:

```
<xml>
        <document type="Generic">
                <DATESCANNED> property value </DATESCANNED>
                <DIRECTION> property value </DIRECTION>
                <BATCHNUMBER> property value </BATCHNUMBER>
                <SEQUENCENUMBER> property value </SEQUENCENUMBER>
                <BARCODE1> property value </BARCODE1>
                <BARCODE2> property value </BARCODE2>
                <BARCODE3> property value </BARCODE3>
        </document>
        <file> file name </file>
</xml>
```

The XML will not be validated when processed by the demo inbound post components.

Different XML structures can be used, but the vanilla Portrait configuration will need changing to reflect the differences. For more information please contact your Product support helpdesk.

When a .ctrl file is found in the source directory, the value in the <file> tag is used to locate the file that is to be processed by Portrait.

When the file has been located and processed, the .ctrl file will be deleted.

If the file cannot be located and the .ctrl file has been in the source directory for longer than 10 minutes, it is assumed the .ctrl file has been added by mistake and will be deleted.

The demo inbound post functionality supports multiple pairs of .ctrl and image files, as well as multiple stand-alone image files being added to the source directory at one time.

Example scenario

The file to be processed by Portrait is called '**my_file.pdf**'.

The .ctrl file is called '**doc_properties.ctrl**'

doc_properties.ctrl contains XML as follows:

```
<xml>
        <document type="Generic">
                <DATESCANNED></DATESCANNED>
                <DIRECTION></DIRECTION>
                <BATCHNUMBER></BATCHNUMBER>
                <SEQUENCENUMBER></SEQUENCENUMBER>
                <BARCODE1>my_barcode</BARCODE1>
                <BARCODE2></BARCODE2>
                <BARCODE3></BARCODE3>
        </document>
        <file>my_file.pdf</file>
</xml>
```

When **my_file.pdf** and **doc_properties.ctrl** are added to the source directory, **my_file.pdf** is processed and sent into Portrait with the property '**BARCODE1**' having a value set as '**my_barcode**'. **doc_properties.ctrl** is deleted.

2.3 How to install the Portrait demo components

The Portrait Foundation Core Software install will not allow the installation of certain demo components without the required software being present on the machine, and some configuration changes can only be made once the installation is complete. The following steps assume that Portrait Foundation is being installed in a single box environment as described in the Portrait Installation Guide.

1 Ensure that the following Microsoft Windows features are enabled:

- Internet Information Services

- Microsoft Message Queue (MSMQ) Server

2 If the QAS address lookup integration is required then the QuickAddress Pro API v6.1 must be installed with the latest Data provided from Experian.

3 **Section '**3 - Pre-install steps**': follow the steps applicable to the required** demo components.

4 **Section '**4 - Installing demo components**': follow the steps applicable to the** demo components being installed.

5 Sec**tion '**5 - Post-install steps**': this step is only applicable if demo outbou**nd e-mail has been installed.

6 The relevant sections noted above describe in detail the processes required to set up the environment.

3   Pre-install steps

This section describes the necessary manual steps that need to be carried out prior to running the Portrait Foundation installation and system setup process.

3.1   Demo post directory structure

The inbound simplex demo post functionality requires a directory to poll for new files and a second directory for storing files that have been processed.

- Create a new directory on a local drive called **"Demo_Post"**. Then add the following sub directories.

  - **destination**

  - **source**

  - **store**
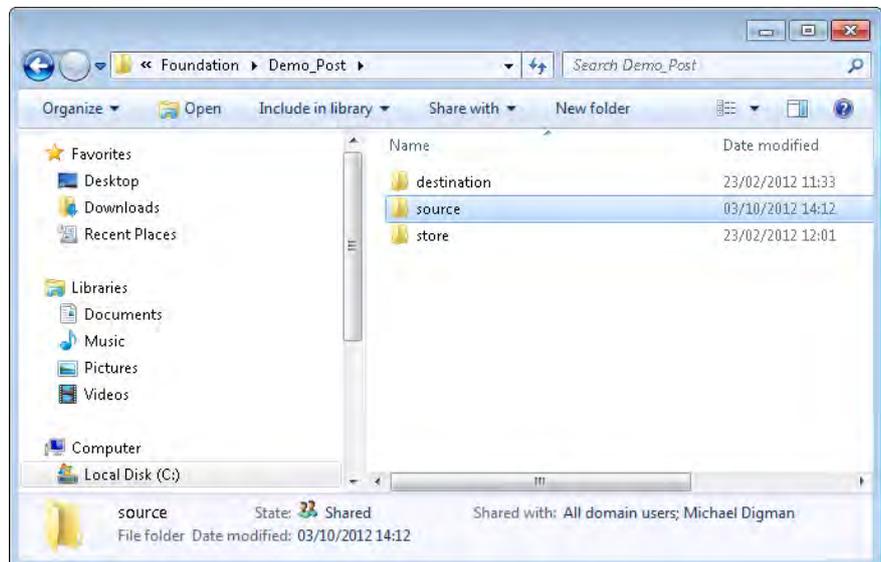
- Finally create a Network File and Folder Share for the Demo_Post\store directory.

4   Installing demo components

4.1   Core software installation

Launch the Portrait Foundation Core Software setup.exe from the "Software\Installsets\Core_Software" **folder on the release CD.**

- Click **Next** to confirm the install version.

- Leave the default Destination Folder and click **Next**.

- Select the "**Custom**" Setup Type and click **Next**.

- Ensure the following features have been selected to be installed on the local hard drive. The Telephony Server is not required to demonstrate CTI.

   NB: Only select QAS if you have the relevant software installed.
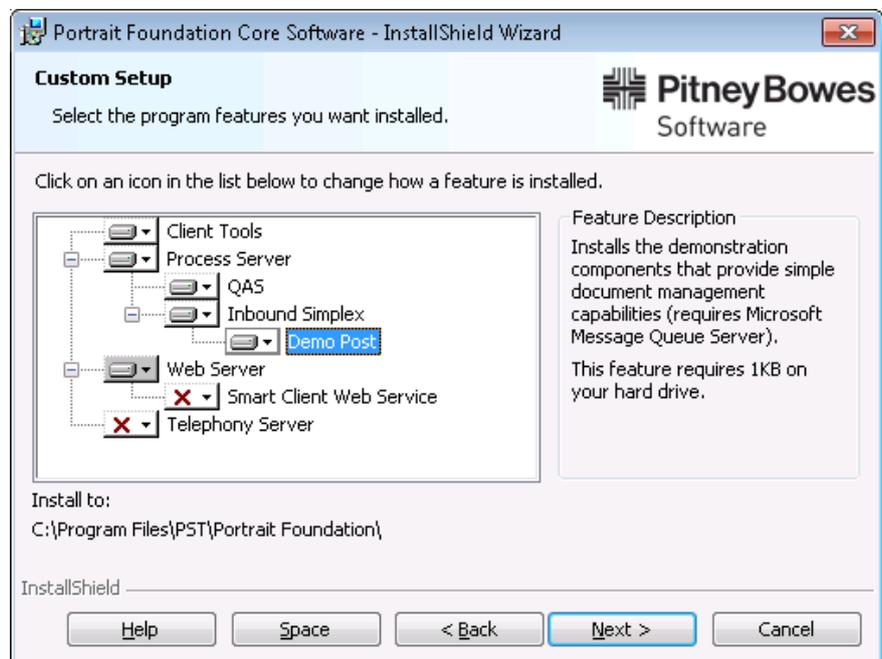

- Click **Next** then **Install** to complete the core software install.

4.2   System setup

Once complete, the System Setup tool should be launched. If not it can be run from the Windows Start menu under **All Programs** > **Portrait Foundation**.

Enter the relevant **System** and **Operation database** settings, then select the "inbound simplex" settings. Enter the following details and click **Apply**.
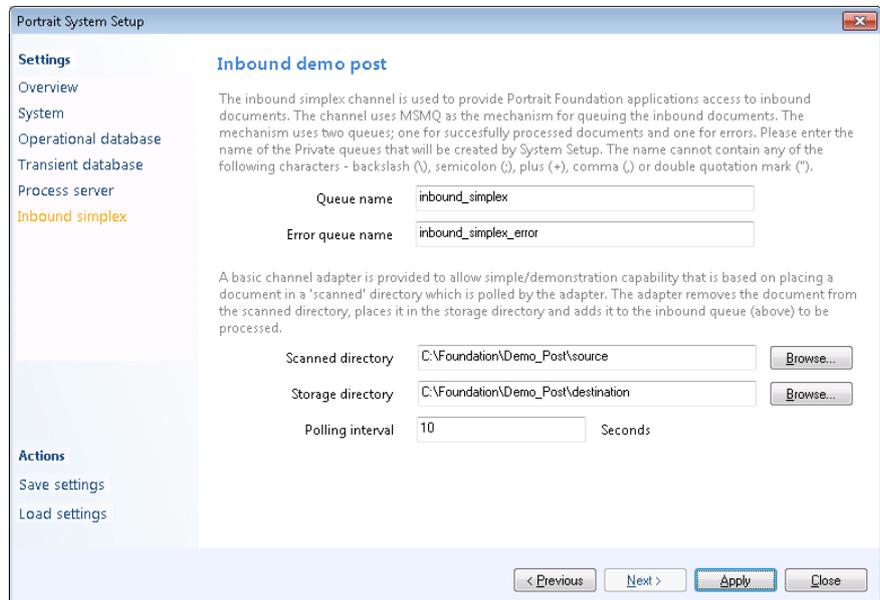
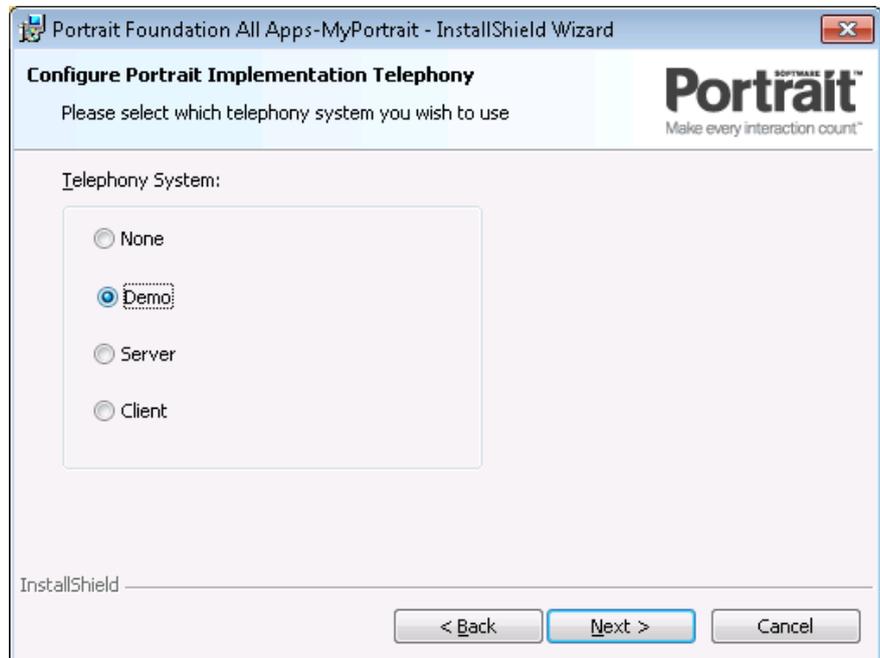On the System Setup Lanuchpad click **Start**.
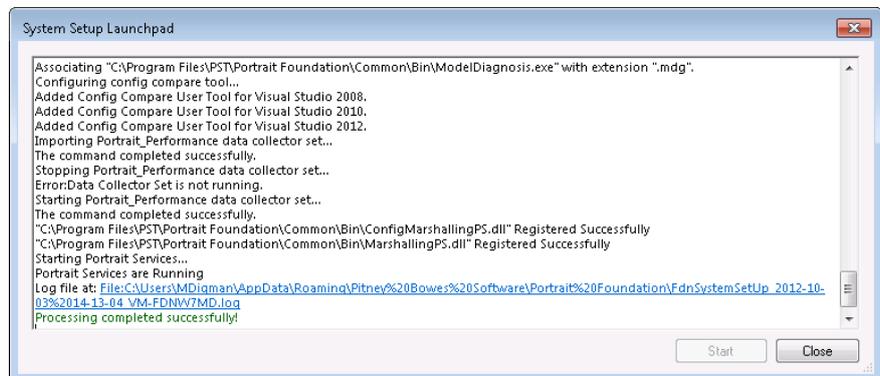
On successful completion, click **Close** and then Close the System Setup tool.

4.3 All applications implementation install

Portrait Foundation demo CTI is installed by the All Applications implementation install.

When the telephony window is displayed, select the "**Demo**' option and click **Next**.

Demo CTI will automatically install and be available as soon as the install is complete.

5   Post-install steps

5.1   Image viewing

To view files and images via Portrait, it is necessary to designate a file system directory that can be used to temporarily store the files while they are being rendered.

To select the temporary image repository:

- Open the Portrait Foundation Management Console.

- Expand the tree and select **"All Servers"**. Now expand **"All Servers"** and expand **"Default settings"**.
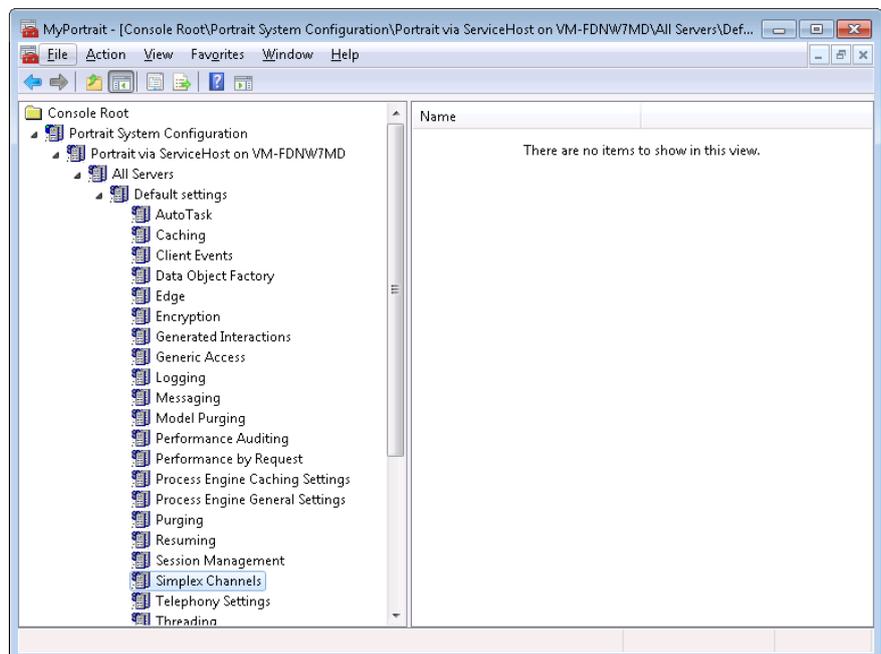
- Right click on **"Simplex Channels"** and select **"Properties"**.
- Select the **"Image viewing"** tab, and click the browse **"..."** button.
- Locate the **"store" network** directory and click OK.

Figure 1 – Image viewing directory
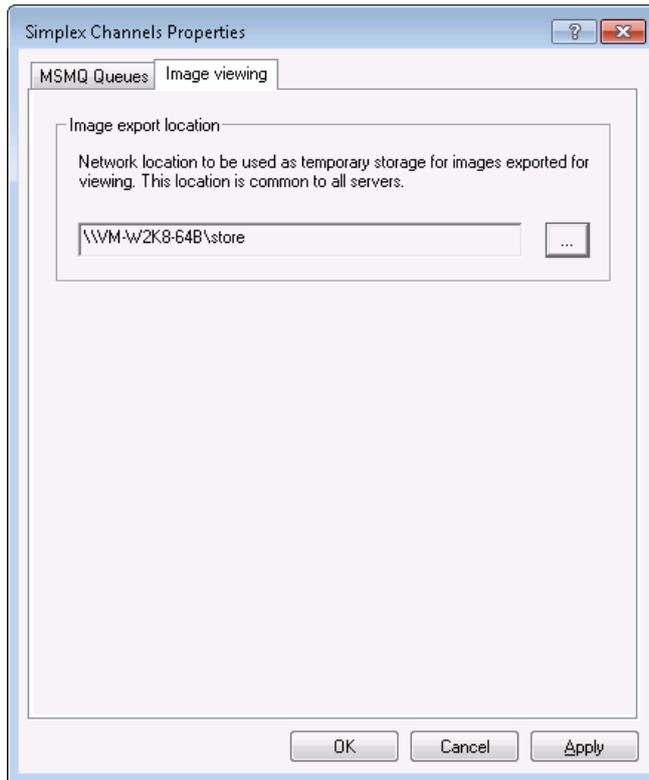
- Click OK to close the dialog.

6   Smoke testing

The following are steps that can be taken to confirm the demo components have been installed and are working correctly.

6.1   Launching the applications

All Portrait Foundation applications can be started using the **"FdnApplicationUrls.html"** web page provided on the release CD under **\Software\Tools**.

6.2   Demo CTI

NB: Before logging onto the Contact Centre, **"Amend telephony details" must by** run in the Agent Manager for the relevant agent. If this is not done Contact Centre logon will fail to get past Select roles.

Log-on to the Portrait Foundation Contact Centre. If the Agent desktop is displayed with the telephony summary at the bottom of the screen, demo Portrait CTI has been installed correctly.

6.3   Demo inbound post

Add a .pdf file to the source directory being polled by the Amc DMS Inbound Adapter service.

To test the demo Portrait inbound post components have been installed successfully, log-on to the vanilla Portrait Contact Centre using the Supervisor **role, Select the Operation 'Workflow->Pick work…'.**

In the displayed 'Pick work – Search criteria' dialog select 'Active' in the Task **status combo box and 'Associate documents' in the Task type combo box. Click the 'Search' button.**

An 'Associate documents' task will be present in the 'Search results' grid. **Highlight the task and click the 'Select' button.**

If the task hasn't appeared, wait a few seconds and try the search again.

The workflow desktop will display the associate documents tab. Select the **'Documents' child tab. The shutter view will display one element representing the** .pdf file.

Select the shutter element and click **the 'View' button –** the .pdf attachment will be displayed via the Adobe Acrobat Internet Explorer plug-in.