What's Changed in ice 14

Part Number: UM_CI_14_20240801

What’s Changed in ice for server version 14

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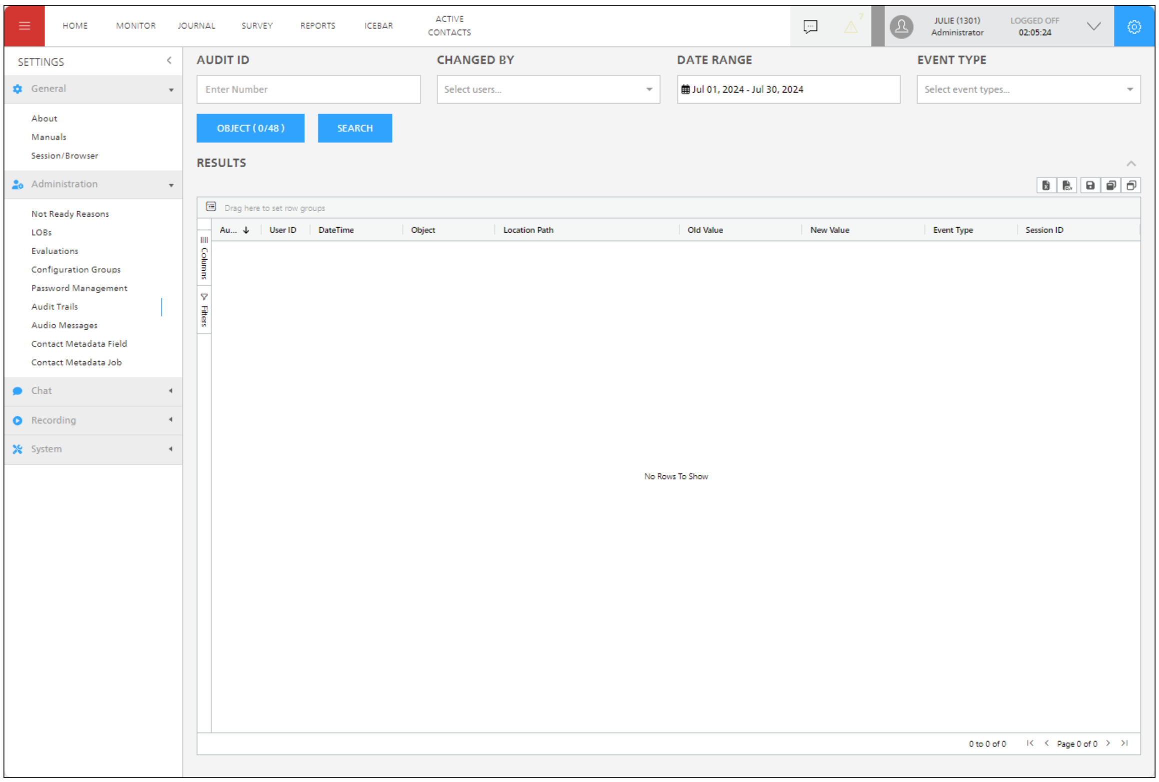
Introduction

This document introduces the new features in ice 14. For more information on specific settings and features, please refer to the User Manuals accessible in the eLearning site and in the iceManager Help Center.

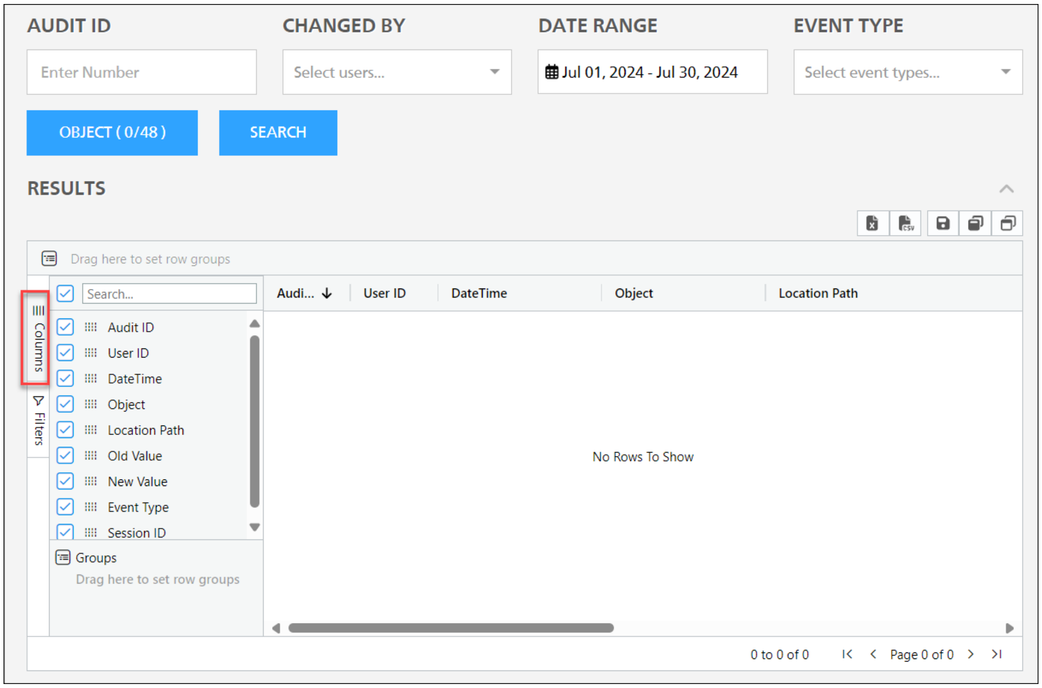
Audit Trails

Introduced in ice 14, audit trails provide administrators with the ability to view changes that have been made in the system. Administrators and global administrators are able to view details of the changes, when the changes were made, and who the changes were made by.

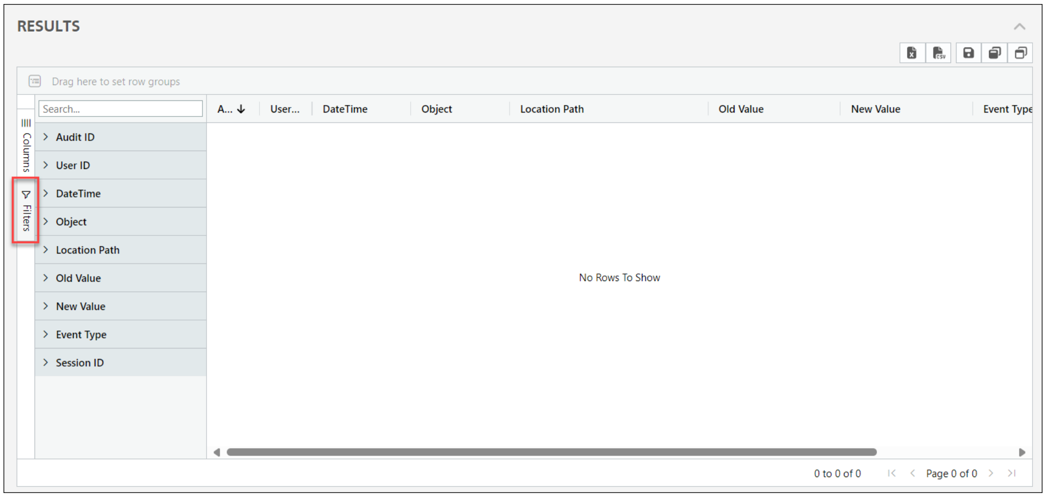


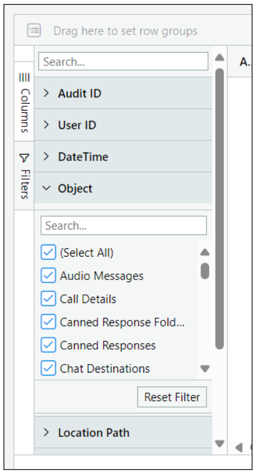
Audit Trails Search Results Grid

The Results table provides information for each audit. You can configure the columns displayed in the table by clicking the Columns heading on the left of the table and using the checkboxes to show and hide the columns in the grid.



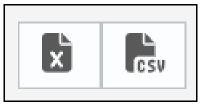
The Filters heading on the left of the table can be used to filter your list of audits according to specific data points.





Export Options

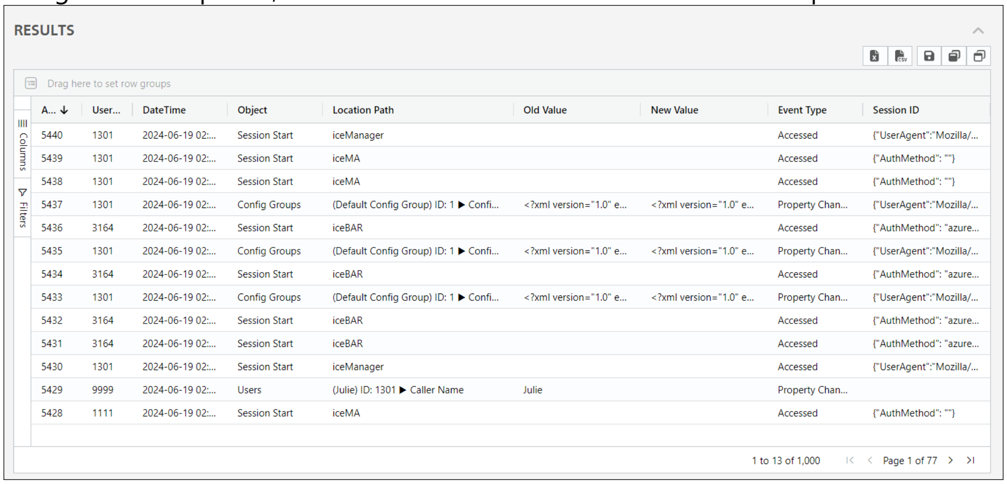
The following options will allow you to export your search results to an Excel or CSV file.



The exported file will reflect the data in the grid at the time of export and will include the columns and contacts that are visible in the search results grid.

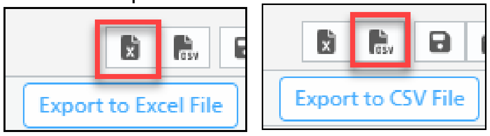
You can export your audit search results using the following steps:

1. Using the filter options, search for the audits to be included in the export.

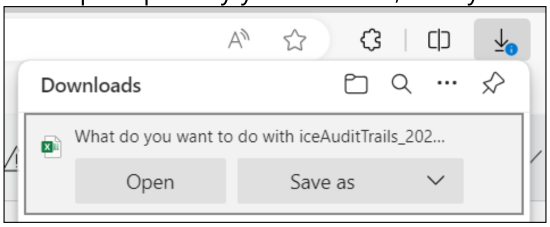


A...	User...	DateTime	Object	Location Path	Old Value	New Value	Event Type	Session ID
5440	1301	2024-06-19 02:...	Session Start	iceManager			Accessed	{"UserAgent":"Mozilla/...
5439	1301	2024-06-19 02:...	Session Start	iceMA			Accessed	{"AuthMethod": ""}
5438	1301	2024-06-19 02:...	Session Start	iceMA			Accessed	{"AuthMethod": ""}
5437	1301	2024-06-19 02:...	Config Groups	(Default Config Group) ID: 1 ▶ Confi...	<?xml version="1.0" e...	<?xml version="1.0" e...	Property Chan...	{"UserAgent":"Mozilla/...
5436	3164	2024-06-19 02:...	Session Start	iceBAR			Accessed	{"AuthMethod": "azure...
5435	1301	2024-06-19 02:...	Config Groups	(Default Config Group) ID: 1 ▶ Confi...	<?xml version="1.0" e...	<?xml version="1.0" e...	Property Chan...	{"UserAgent":"Mozilla/...
5434	3164	2024-06-19 02:...	Session Start	iceBAR			Accessed	{"AuthMethod": "azure...
5433	1301	2024-06-19 02:...	Config Groups	(Default Config Group) ID: 1 ▶ Confi...	<?xml version="1.0" e...	<?xml version="1.0" e...	Property Chan...	{"UserAgent":"Mozilla/...
5432	3164	2024-06-19 02:...	Session Start	iceBAR			Accessed	{"AuthMethod": "azure...
5431	3164	2024-06-19 02:...	Session Start	iceBAR			Accessed	{"AuthMethod": "azure...
5430	1301	2024-06-19 02:...	Session Start	iceManager			Accessed	{"UserAgent":"Mozilla/...
5429	9999	2024-06-19 02:...	Users	(Julie) ID: 1301 ▶ Caller Name	Julie		Property Chan...	
5428	1111	2024-06-19 02:...	Session Start	iceMA			Accessed	{"AuthMethod": ""}

2. You can export the data to an excel or CSV file using the available buttons.



3. When prompted by your browser, save your file to your local machine.

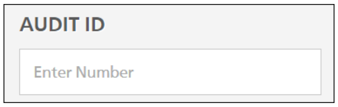


Searching for an Audit Trail

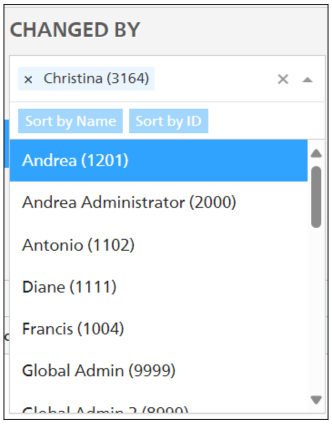
Administrators can search for audit trails based on the audit ID, user who made the change, the date the change was made, the event type and the object.

<u>To search for an audit trail, complete the following steps:</u>

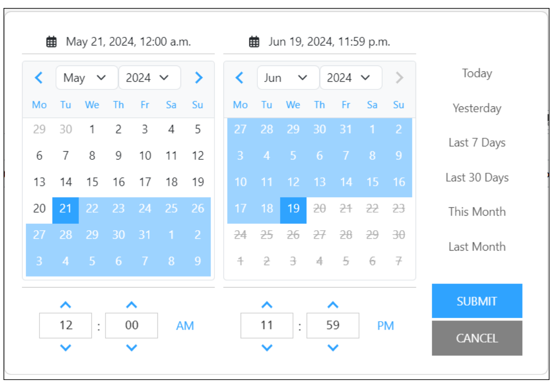
1. The filters along the top of the window allow you to filter your audit results by audit ID, user, date and event type. The audit ID allows you to search for a specific audit item based on the unique ID assigned. If you know the ID, enter it in this field and click search to narrow the search results.



2. The User filter allows you to search for audit items changed by a specific user or users. Find and select the appropriate users from the 'Changed by' drop-down. You can search for one user or multiple users. To delete a selection, click the grey *x* beside the name.

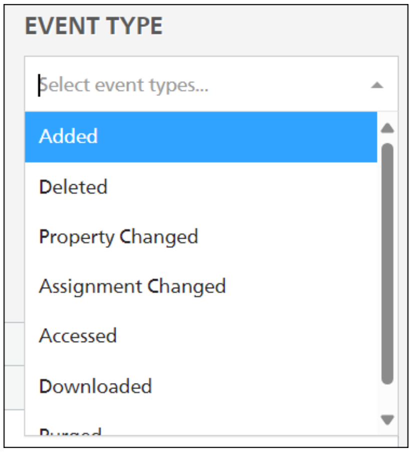


3. The date range filter allows you to further narrow down your search results to items changed during a certain interval.

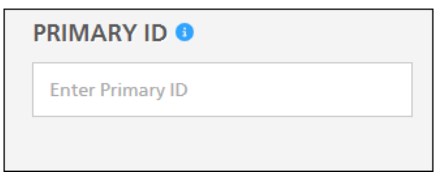


Select from one of the preset intervals on the right, or select a custom range using the two calendars in the window. The calendar on the left can be used to select the starting date and time while the calendar on the right can be used to select the ending date and time of the interval.

4. The event type filter allows you to filter the audit results based on the object event type.

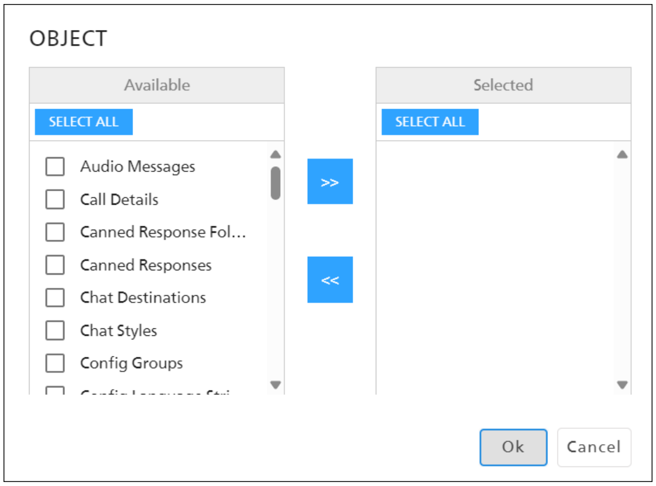


5. The Primary ID filter is the first ID or subdirectory within a path. For example, in the location path *ID:6001 / No Answer Time*, the Primary ID is 6001.



Note: This filter is only available for certain object types.

6. The Object filter allows you to filter your search results based on the type of object that is being audited.
To select an object, select the item from the *Available* panel on the left by enabling the checkbox. Use the arrows in the middle to move the items between the two panels.



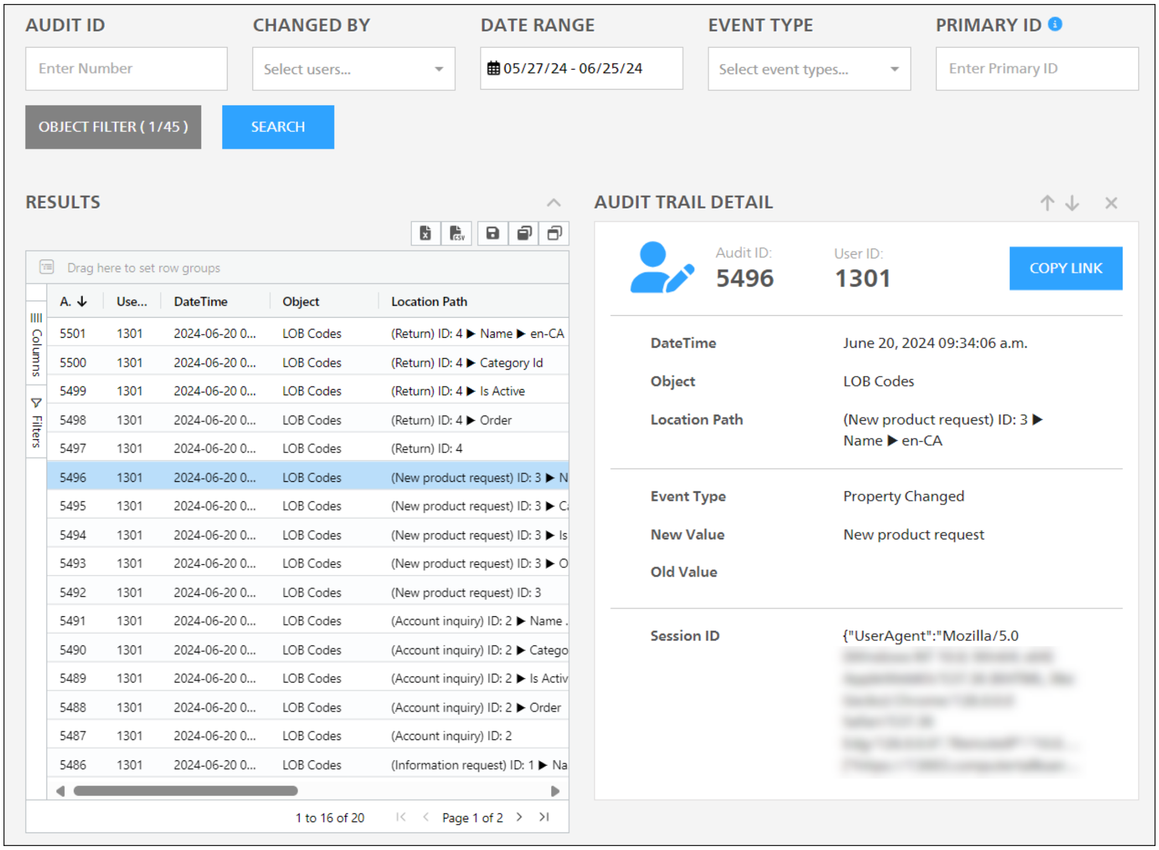
7. Click *Search Contacts*. The results section refreshes with audit items that match the filter criteria.

The search results provide detailed information about the audit. The table below describes the fields in the results grid.

Column	Description
Audit ID	Each audit is assigned a unique ID for identification purposes.
User ID	The user ID of the user who made the change.
DateTime	The date and time that the change was made.
Object	The object that was changed. Objects include: • Audio messages • Call details • Canned response Folders • Canned responses • Chat destinations • Chat styles • Config groups • Config language strings • Datastore archive rules • Queues • Recording options • Recording schedules • Recordings • Report schedules • Routing rules • Screen recording server config • Server variable • Servers

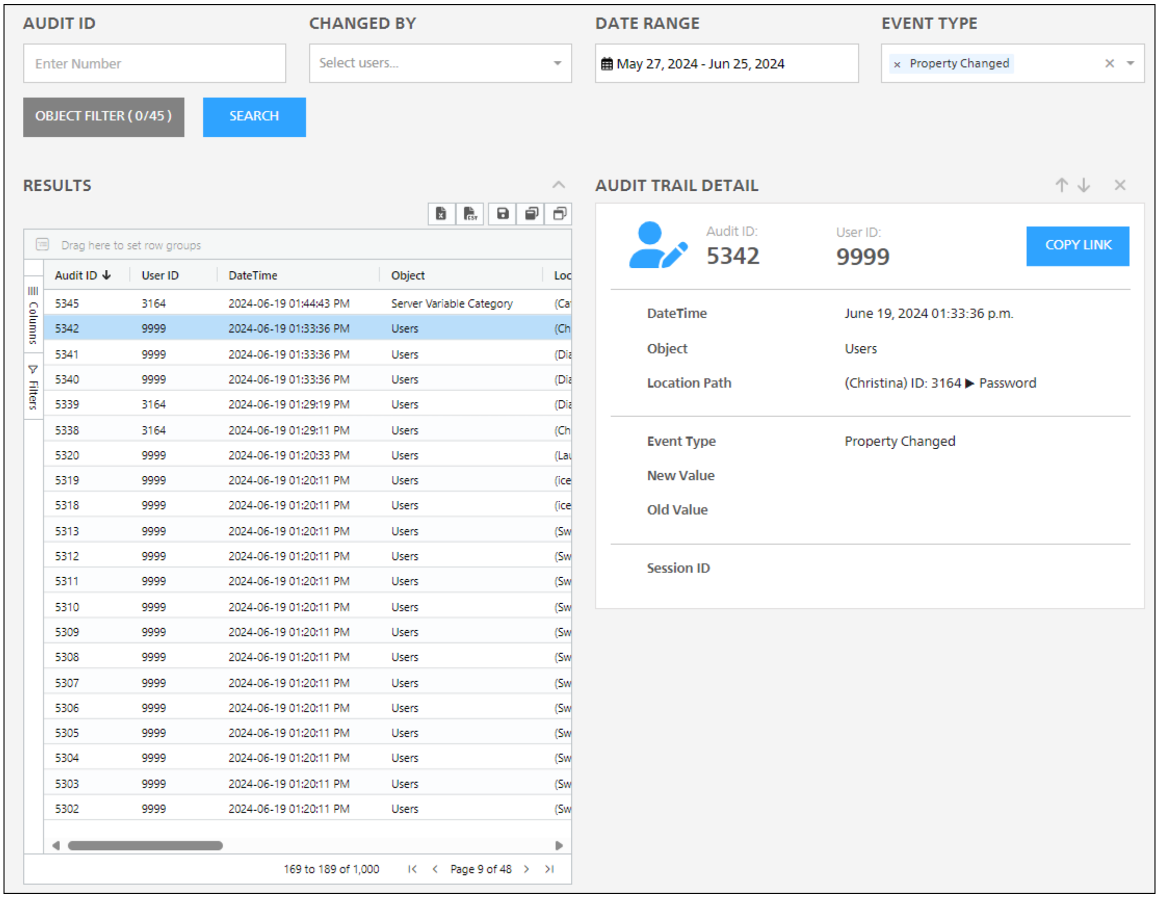
	• Datastores • Email addresses • Email groups • Evaluation forms • Evaluations • Holiday • Languages • LOB categories • LOB codes • Mail accounts • Mail settings • Manager settings • Not ready reasons • Session start • Skills • Survey audio file • Survey response • Survey runs • Surveys • Switches • Teams • Transcripts • UC Addresses • UC Groups • Users
Location Path	The location path of the object that was changed.
Old Value	The object's previous value prior to the change.
New Value	The new value assigned to the object after the change.
Event Type	The event type associated with the object. Options include: • Added • Deleted • Property Changed • Assignment Changed • Accessed • Downloaded • Purged
Session ID	The iceManager session ID where the change was made, if applicable.

To open the Details frame for the entry you are interested in, select the entry from the 'Results' frame.



Interpreting the Details Frame

The Details frame contains information about the audit trail. For more information on how to interpret the details provided, consider the following example:



From this example, you can see the following information:

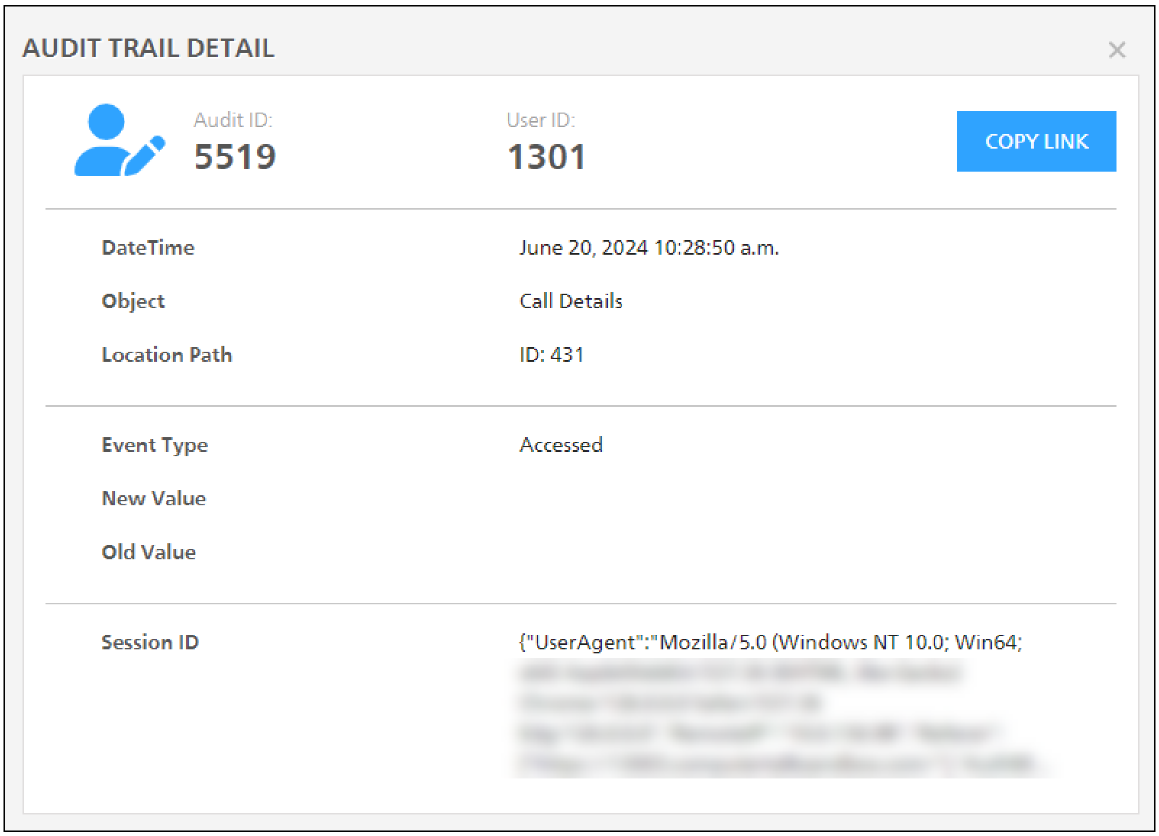
Column	Detail
Audit ID	5342
User ID	9999
DateTime	June 19, 2024 01:33:36 p.m.
Object	Users
Location Path	(Christina) ID: 3164 > Password
Old Value	N/A
New Value	N/A

Event Type	Property Changed
Session ID	N/A

From these details, you can see that the audited item was changed by user 9999 on June 19, 2024 at 1:33 pm.

This was a property change to a user. In this example, the change was made to user 3164, and from the location path, you can see that the change was made to the user's password. The old and new value fields are not populated to retain password security.

Consider this next example:

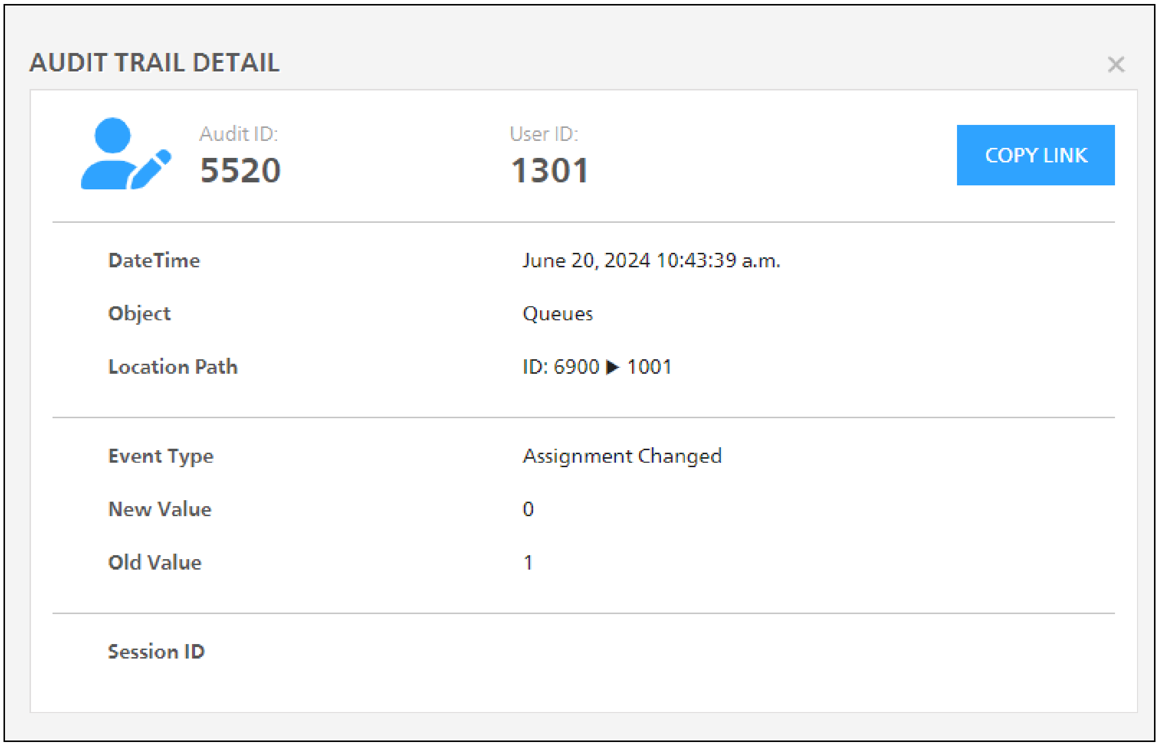


You can see that the audited item was accessed by user 1301 on June 20, 2024 at 10:28 a.m.

The event type shows that the object call details, was accessed by the user.

The location path tells you the contact ID of the call that was viewed by user 1301.

Lastly, consider this third example:



You can see that the audited item was changed by user 1301 on June 20, 2024 at 10:43 a.m.

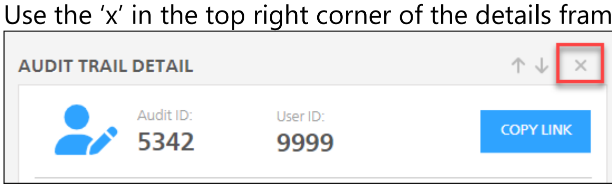
The event type shows that this item was an assignment change and the object field shows that it was related to queues, so you can see this item was a queue assignment change.

The location path indicates that the assignment change was for queue 6900, the training queue and user 1001.

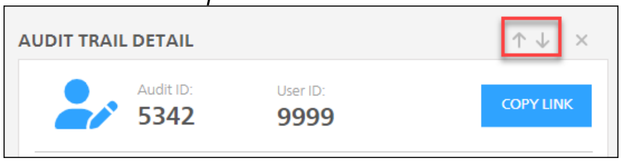
Lastly, from the new and old value, we can see that the old value was set to 1 (true), meaning the queue was originally assigned to the user. It has been updated to a value of 0 (false), indicating queue 6900 has been unassigned from user 1001.

Note:

- The *Copy Link* button can be used to share the audit trail detail with another administrator.
- Use the 'x' in the top right corner of the details frame to close the frame.



- Use the *next* and *previous* arrows in the details frame to navigate between the audit trails.



Audio Messages

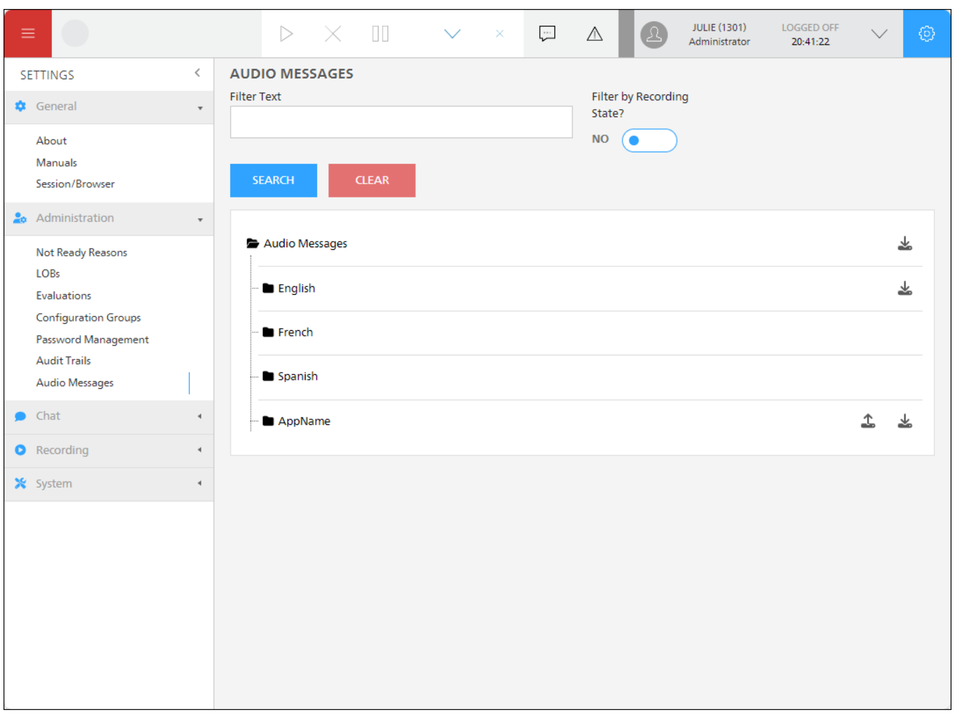
In ice 14, the audio message section allows team leaders, supervisors and administrators to review, manage and update the audio prompts used in the IVR.

This page consists of a search field, followed by the audio message folders.

In ice, audio message records are separate from audio files. Audio message records are the message paths used within workflow and are defined and created in iceAdministrator within the audio messages folder.

The audio file is the prompt file that plays in the system and can be created within this audio messages section. The audio messages tool allows users to record, generate TTS or upload the audio file that corresponds with the audio message record.

Note: This tool does not allow you to add or delete audio message records. Adding and deleting audio message records must still be managed through the iceAdministrator tool.



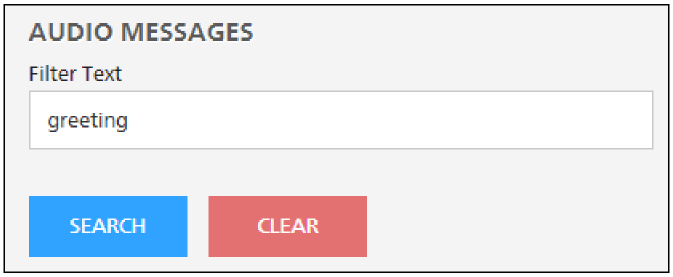
Audio Message Search

The audio message search field allows users to search for messages based on text and recording state.

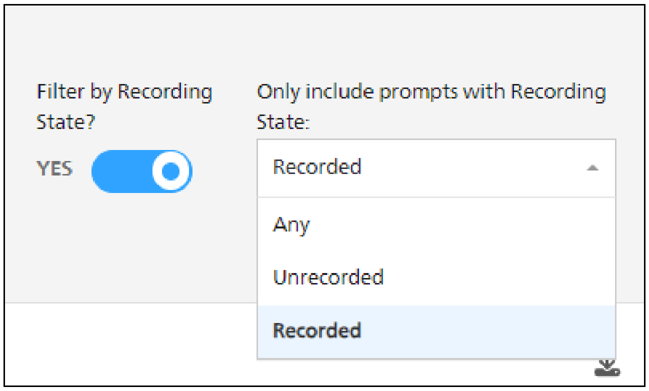
The *Filter Text* field allows users to search for audio messages containing specific keywords. The *Filter by Recording State* toggle allows users to filter prompts by recording state.

<u>The steps below demonstrate how to search for an audio message:</u>

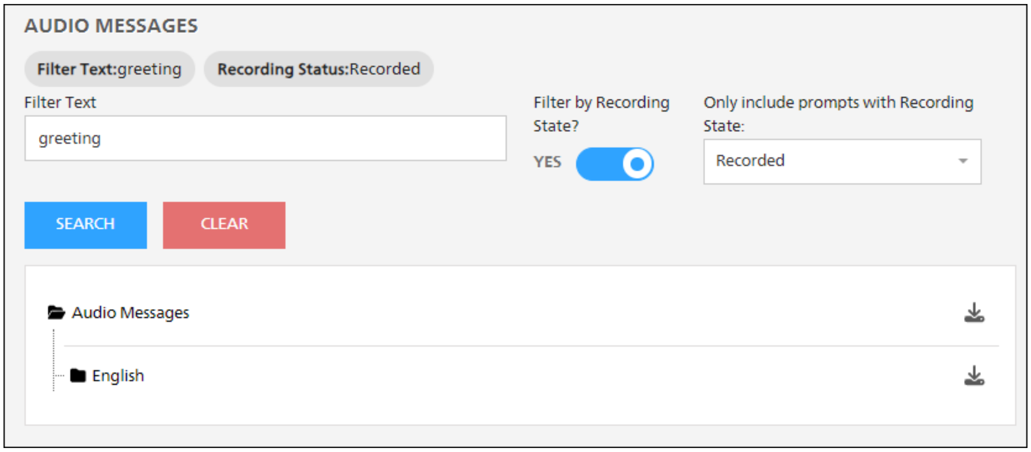
1. In the Filter Text field, enter your keyword or phrase.



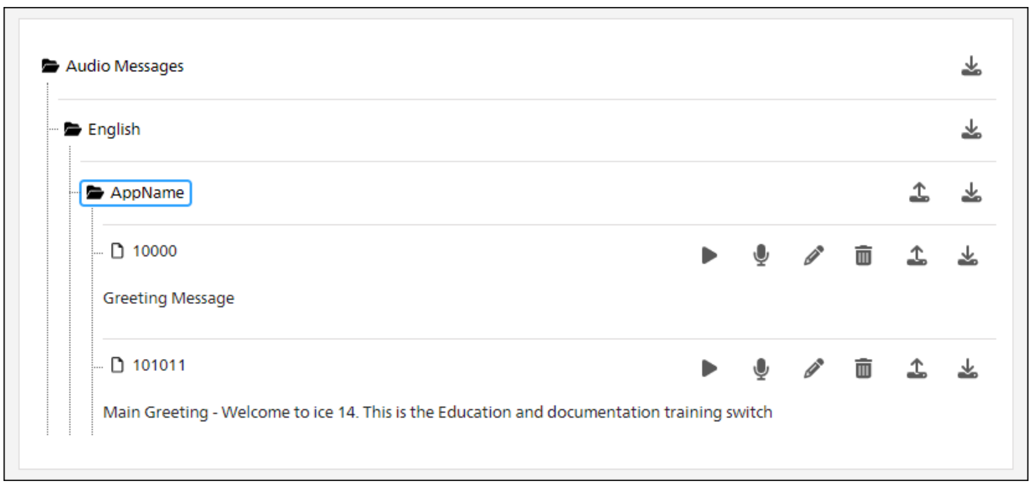
2. If you would like to filter the prompts by recording state, enable the *Filter by Recording State* toggle and select your desired state.



3. Click the Search button.



4. Expand the folders to see the filtered audio messages.

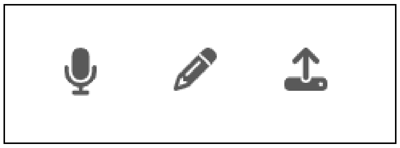


Recording an audio file

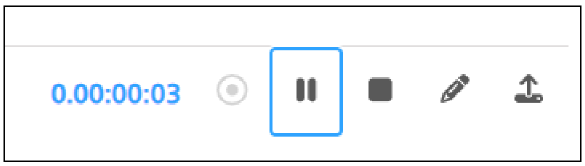
Follow the steps below to record an audio file:

1. Locate the audio message you wish to record.

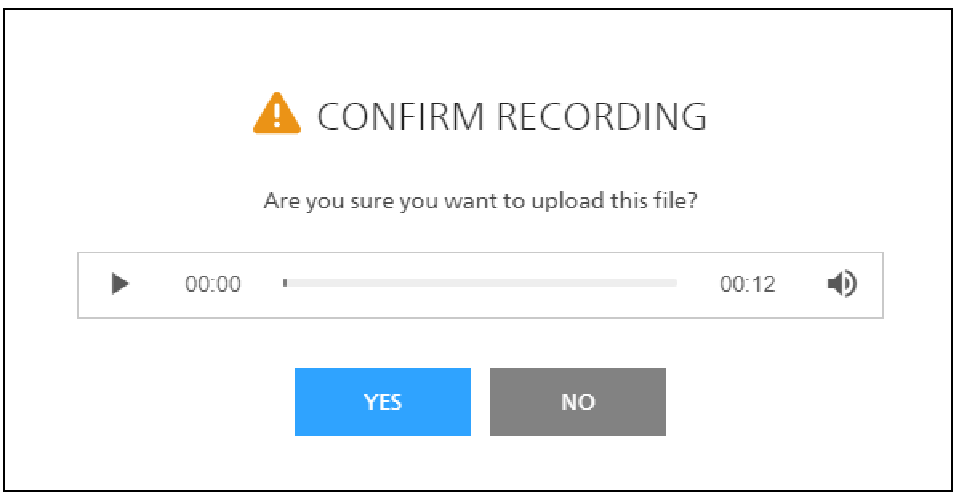
2. If there is no current audio file associated with the audio message, you will see three buttons in the top right corner of the message. These buttons that allow you to record the file, edit the file, or upload a file.



3. To record the file, click on the record button. The recording will begin directly in the browser. The inline controls allow you to pause, resume or stop the recording when you are finished.

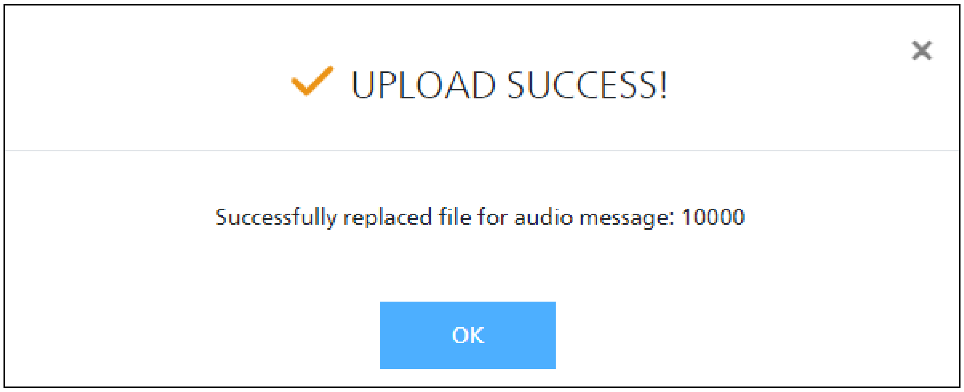


4. When you have clicked the stop button, the following confirmation window will display. You can listen to the recording using the player in in the window.



To confirm the recording, select *Yes*. If you would like to cancel the recording, select *No*.

5. If you have selected *Yes,* the following window will display. Click OK to close the window.

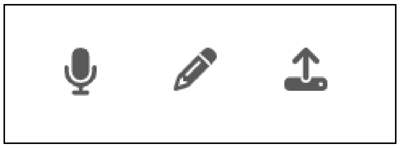


Editing an audio file

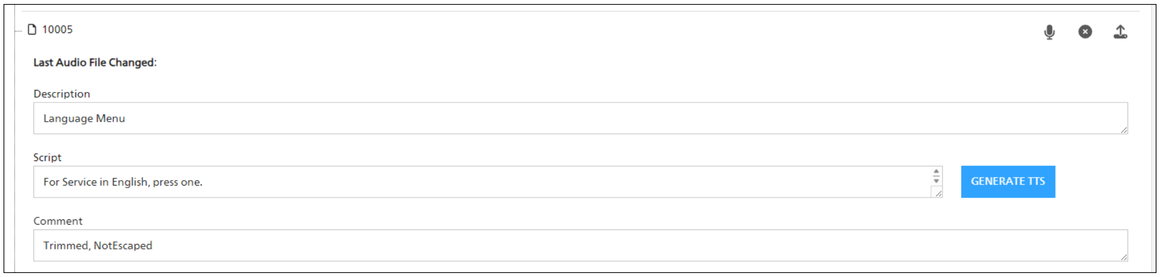
Follow the steps below to edit an audio file:

1. Locate the audio message you wish to modify.

2. In the top right corner of the message select the edit button.

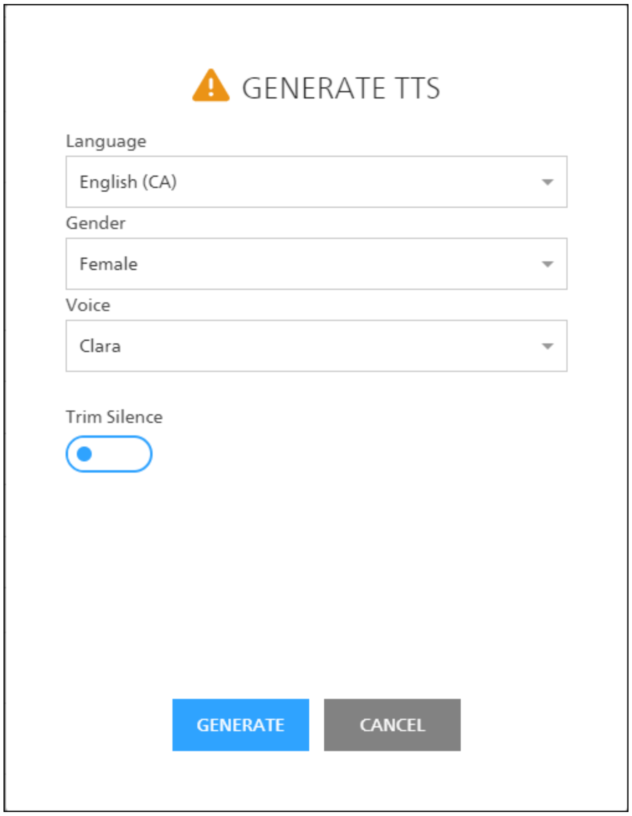


3. In edit mode, you can modify the description of the audio file, generate text to speech (TTS), and modify the comment field.



4. To generate a TTS message, enter your file script in the *Script* field. When complete, click the *Generate TTS* button to generate the TTS audio file.
   Note: This field also supports SSML.

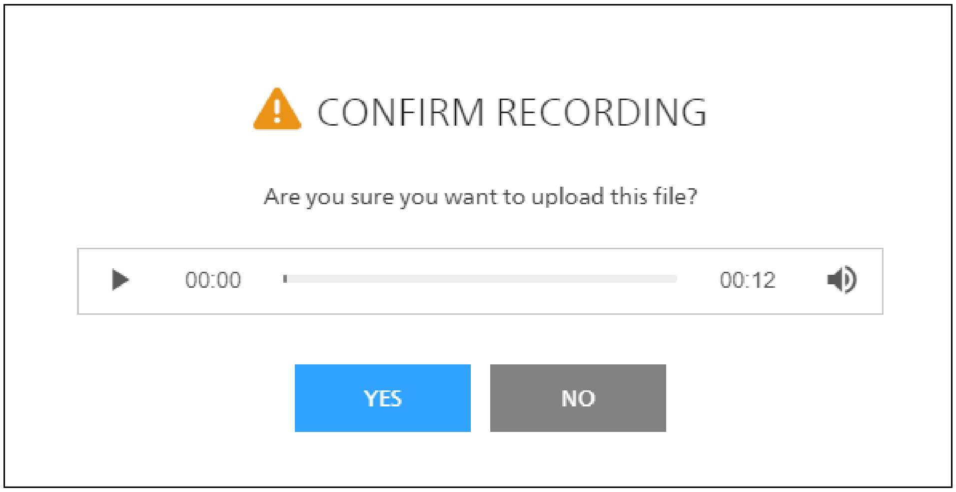
5. The following window will display. Select the TTS language, gender and voice from the options provided.



   Click *Generate* to generate the file.

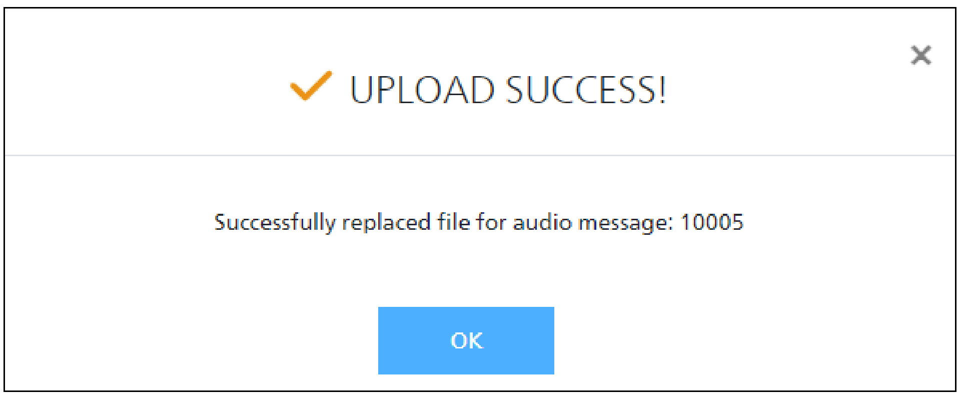
6. The following message will appear.

   You can listen to the recording using the player in in the window.



To confirm the recording, select *Yes*. If you would like to cancel the recording, select *No*.

7. If you have selected *Yes,* the following window will display. Click OK to close the window.

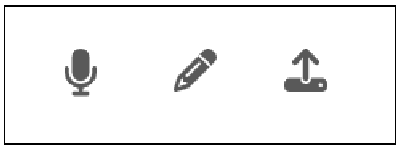


Uploading an audio file

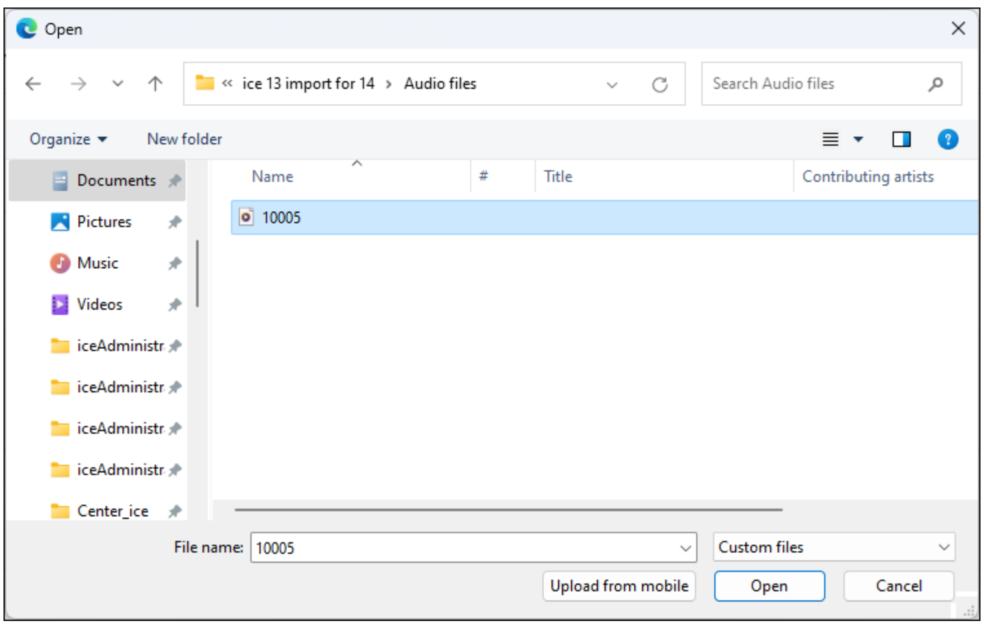
Follow the steps below to upload an audio file:

1. Locate the audio message you wish to upload.

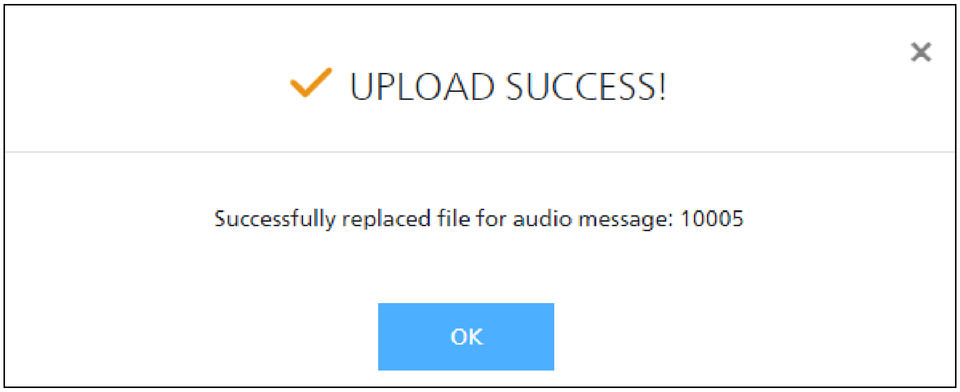
2. In the top right corner of the message select the upload button.



3. This will open a file explorer on your local machine. Select the file you wish to upload and click *Open*.



8. The following window will display. Click OK to close the window.

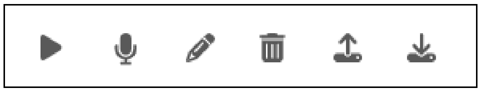


Listening to an audio file

Follow the steps below to listen to an existing audio file:

1. Locate the audio message you wish to modify.

2. In the top right corner of the message select the play button.



3. The video player will appear in line with the audio message. Use the controls to pause, resume and stop the file playback.

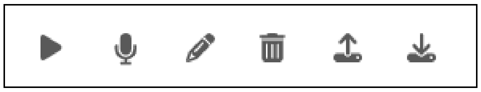
Deleting an audio file

Note: Audio message records can only be created or deleted from the iceAdministrator tool.

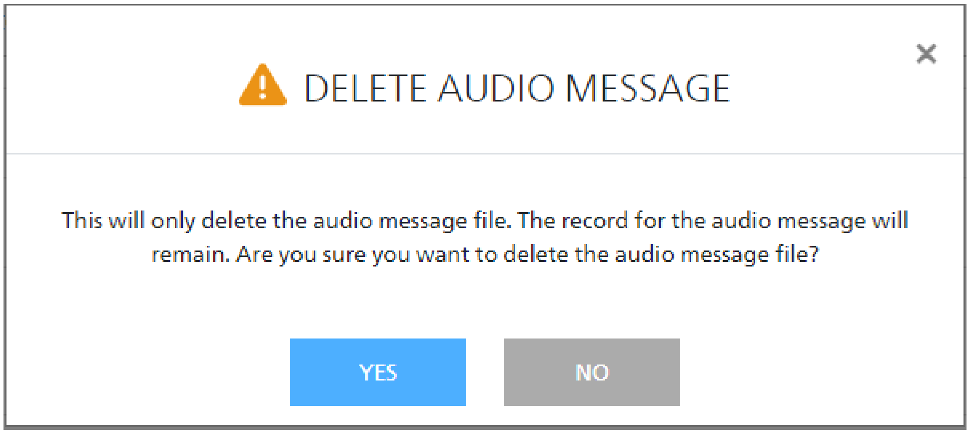
Follow the steps below to delete an existing audio file:

1. Locate the audio file you wish to delete.

2. In the top right corner of the message select the delete button.

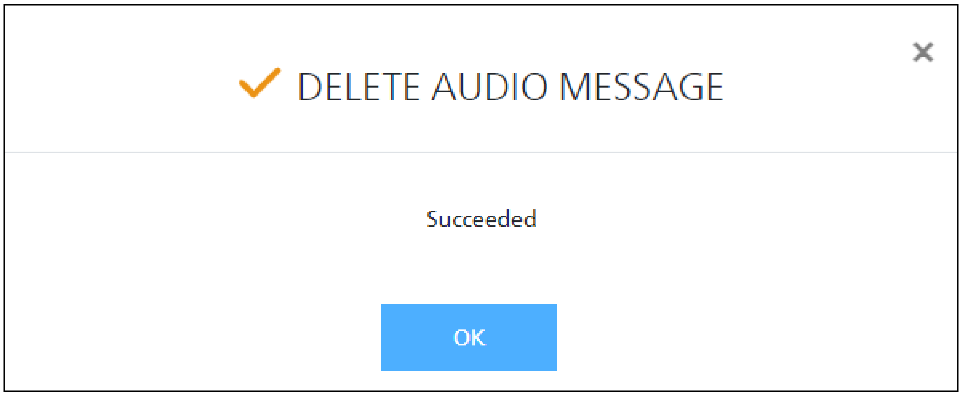


3. The following confirmation message will display. Remember, deleting the audio file will not delete the audio message.



Select *Yes* to delete the audio file or *No* to cancel.

4. Upon successful deletion, the following message will display.

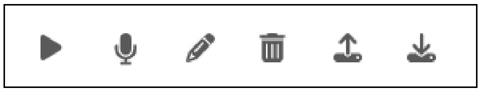


Downloading an audio file

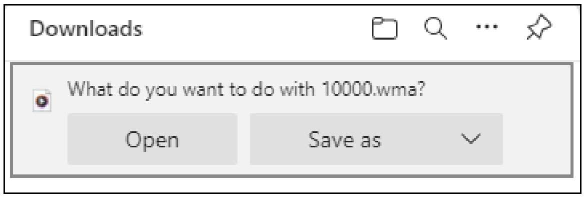
Follow the steps below to download an existing audio file:

1. Locate the audio message you wish to download.

2. In the top right corner of the message select the download button.

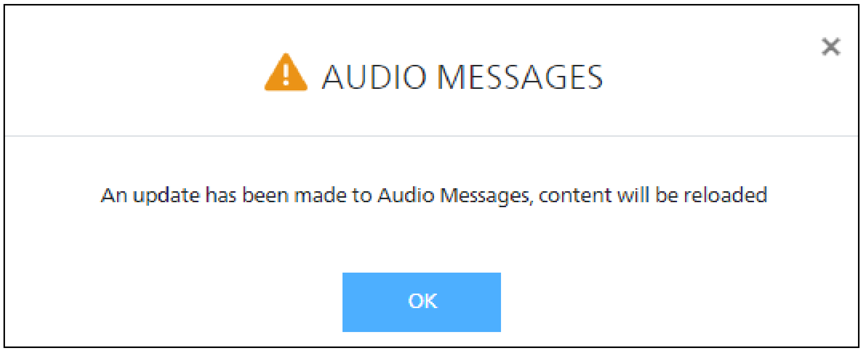


3. Save the file to your preferred location on your local machine.



Note: You can also download all audio files within a folder using the download button in line with the folder name.

The following message will appear each time a change is saved to notify all users modifying audio messages.



After closing the message, the content on the page will reload and any open folders will need to be reopened.

Journal

In ice 14, we have added a new Contact Metadata filter, and a transcript filter within the advanced filters section. We have also added post call transcription and Contact Summarization for customers with recording and post call transcription enabled, which can automatically generate a summary of a call based on the transcript. Ice 14 also supports the creation of Azure OpenAI contact metadata jobs and virtual workflow contact metadata jobs that populate new contact metadata fields within journal to display custom information.

LOBs Assigned

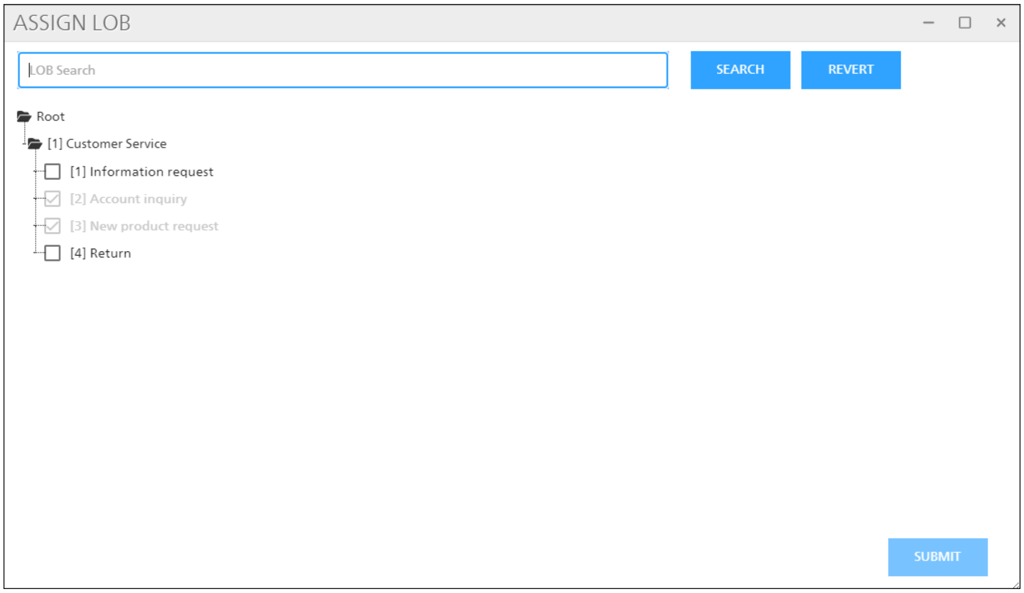
The LOBs Assigned section provides information on all LOB codes assigned to the contact. Users with team lead access and above can assign additional codes to the contact as needed once the contact has been completed.

To assign an additional LOB code:

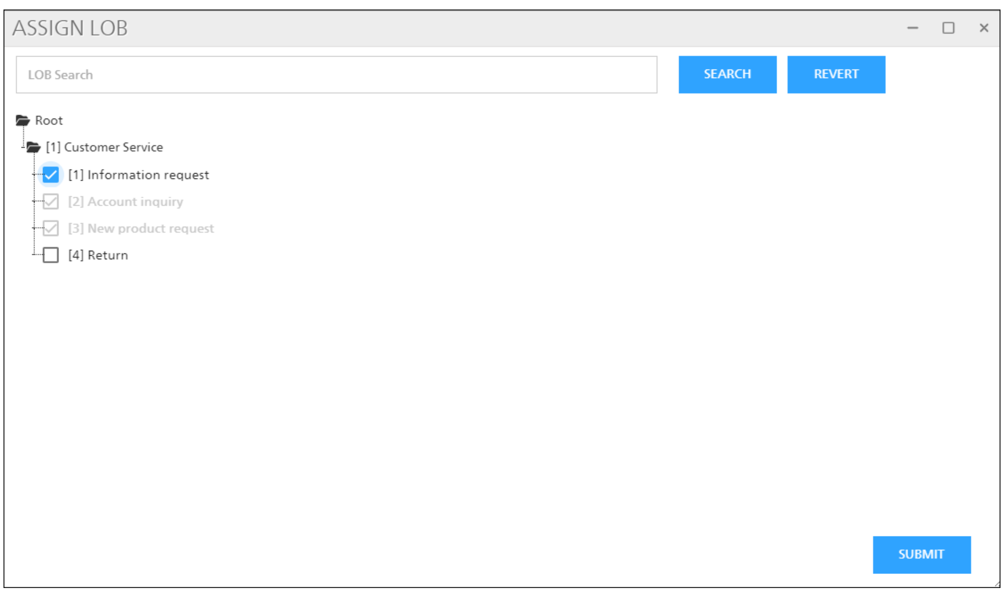
1. Expand the LOB Assigned section.

2. Select the (+) sign in the top right corner of the section to assign a new code.

3. The Assign LOB window will open to show a list of all available LOB codes.
   If a code has already been assigned to the contact, it will be greyed out.



4. Select the code you would like to assign to the contact by enabling the checkbox next to the code. Click submit.



5. The new code has been added.

LOBS ASSIGNED +

ID	Name	Time Applied	Applied By
1	Information request	2024-06-20 1:24:21 p.m.	1301
2	Account inquiry	2024-06-20 10:28:43 a.m.	1301
3	New product request	2024-06-20 10:28:43 a.m.	1301

Note: You cannot unassign LOB codes.

If no LOB Codes have been assigned for the contact, you will see the following display.

NO LOBS ASSIGNED +

Contact Metadata

Contact Summarization

Contact Summarization uses Generative AI to generate contact summaries based on the call transcript. It provides an AI-generated summary of the interaction and can be viewed in journal, saving agents from manually writing out summaries.
While the data is generated through a metadata job, the field is displayed in its own section above the other contact metadata information.

CONTACT SUMMARY

The customer, Joe, called about a package that was marked as delivered but was missing. The agent checked with the customer's neighbors and discovered that the package was found in the neighbor's backyard. The agent apologized for the inconvenience and promised to escalate the issue to the delivery team and add specific delivery instructions to the customer's account to prevent future occurrences.

Contact Summaries can be scheduled in the same way as recordings and transcripts. The contact summarization metadata job can also be run ‘on demand’ by administrators like all contact metadata jobs, provided that the metadata job state is set to Preview.

Contact Metadata

The table below the Contact Summary field is the Contact Metadata table. This table displays the data populated by contact metadata jobs after they have been executed, within their associated fields.

CONTACT METADATA

Name	Value
Contact Summary Completion Usage	70
Contact Summary Prompt Usage	944
Next Steps	Summary of next steps: Global Admin will report the delivery issue to the delivery team and escalate the recurring problem to be addressed. They will also add specific delivery instructions to Joe's account to ensure packages are left in a secure location. They will ensure that the issue is resolved and make sure it doesn't happen again.

The blue table icon in the top right corner allows you to open the table in a new window.

CONTACT METADATA

ID	Value
Contact Summary Completion Usage	70
Contact Summary Prompt Usage	944
Next Steps	Summary of next steps: Global Admin will report the delivery issue to the delivery team and escalate the recurring problem to be addressed. They will also add specific delivery instructions to Joe's account to ensure packages are left in a secure location. They will ensure that the issue is resolved and make sure it doesn't happen again.

Contact Metadata Job History

The Contact Metadata Job History table displays the list of contact metadata jobs that have run. The state will indicate whether the job has been created, running, completed or failed.

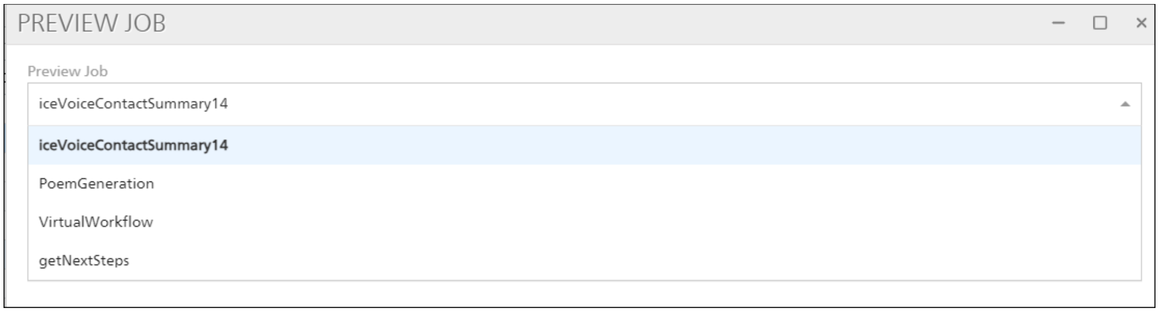
CONTACT METADATA JOB HISTORY — Preview

ID	Name	State
1	iceVoiceContactSummary14	Complete
2	PoemGeneration	Complete
6	getNextSteps	Complete

The preview button in the top right corner of the section allows you to run a contact metadata job 'on demand'.

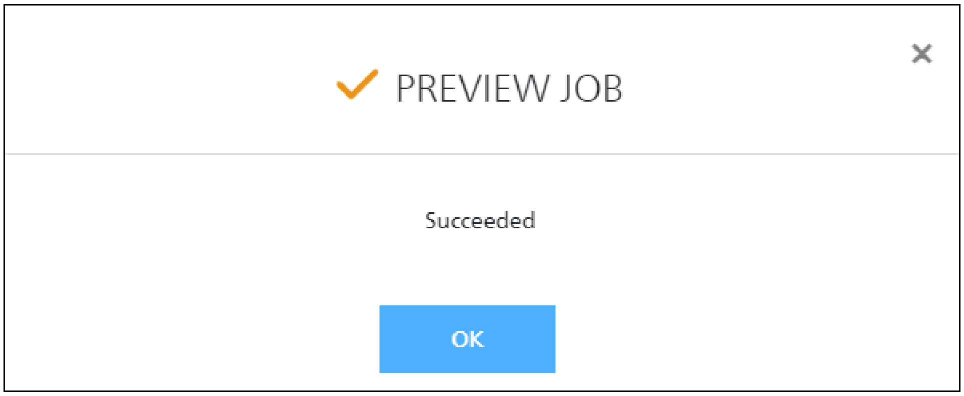
Note: The preview button is only available for administrators and will only be available if the contact metadata job state is set to *Preview*.

Click the preview button. A list of created contact metadata jobs will appear.



Select the job you would like to run and click Submit.

You will see the following window upon submit if the preview job was successful.



If the job has already been run, the existing data in the contact metadata field will be overwritten.

Note: Depending on the configured job, the job can take a few minutes to complete.

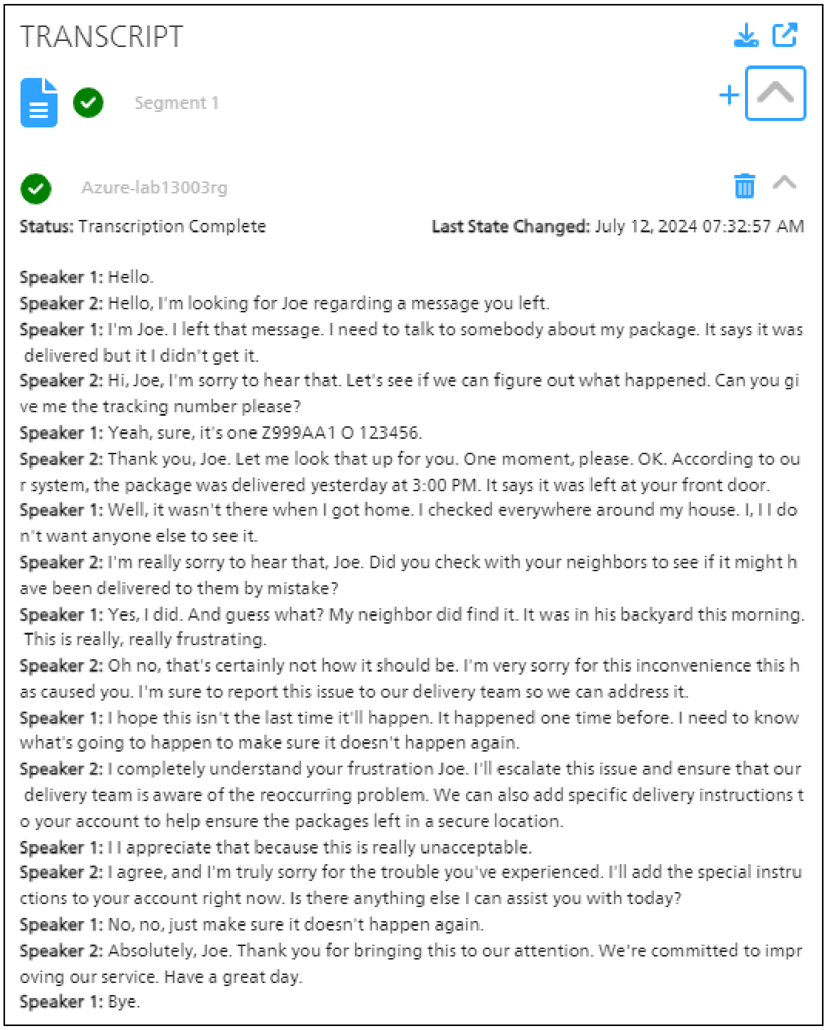
Transcript

Post-call transcription is available for users with call recording enabled, and transcription enabled. Once a transcription provider is configured, the iceTranscriber service will send the call recording to the transcription provider and will return the transcript to be displayed in journal.

Note: Depending on the file size, this process can take up to 15 minutes to complete.

Access to transcripts follow the same permissions as recordings. Users may only access their own call transcripts, team leaders may access the transcripts for any users assigned to their team, supervisors may access the transcripts for users assigned to a common queue, and administrators may access all transcripts.

Below is a screenshot of the transcript section for a voice call with one contact segment.



TRANSCRIPT

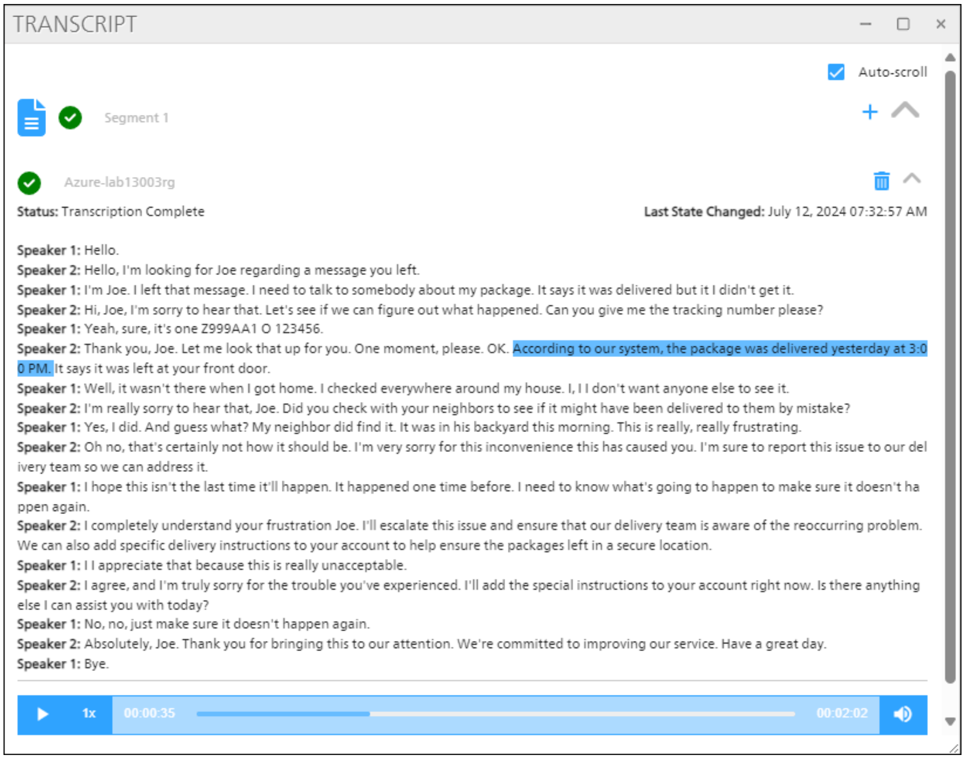
Segment 1

Azure-lab13003rg

Status: Transcription Complete **Last State Changed:** July 12, 2024 07:32:57 AM

Speaker 1: Hello.
Speaker 2: Hello, I'm looking for Joe regarding a message you left.
Speaker 1: I'm Joe. I left that message. I need to talk to somebody about my package. It says it was delivered but it I didn't get it.
Speaker 2: Hi, Joe, I'm sorry to hear that. Let's see if we can figure out what happened. Can you gi ve me the tracking number please?
Speaker 1: Yeah, sure, it's one Z999AA1 O 123456.
Speaker 2: Thank you, Joe. Let me look that up for you. One moment, please. OK. According to ou r system, the package was delivered yesterday at 3:00 PM. It says it was left at your front door.
Speaker 1: Well, it wasn't there when I got home. I checked everywhere around my house. I, I I do n't want anyone else to see it.
Speaker 2: I'm really sorry to hear that, Joe. Did you check with your neighbors to see if it might h ave been delivered to them by mistake?
Speaker 1: Yes, I did. And guess what? My neighbor did find it. It was in his backyard this morning. This is really, really frustrating.
Speaker 2: Oh no, that's certainly not how it should be. I'm very sorry for this inconvenience this h as caused you. I'm sure to report this issue to our delivery team so we can address it.
Speaker 1: I hope this isn't the last time it'll happen. It happened one time before. I need to know what's going to happen to make sure it doesn't happen again.
Speaker 2: I completely understand your frustration Joe. I'll escalate this issue and ensure that our delivery team is aware of the reoccurring problem. We can also add specific delivery instructions t o your account to help ensure the packages left in a secure location.
Speaker 1: I I appreciate that because this is really unacceptable.
Speaker 2: I agree, and I'm truly sorry for the trouble you've experienced. I'll add the special instru ctions to your account right now. Is there anything else I can assist you with today?
Speaker 1: No, no, just make sure it doesn't happen again.
Speaker 2: Absolutely, Joe. Thank you for bringing this to our attention. We're committed to impr oving our service. Have a great day.
Speaker 1: Bye.

The buttons in the top right corner allow users to download all transcripts or open transcripts in a new window.



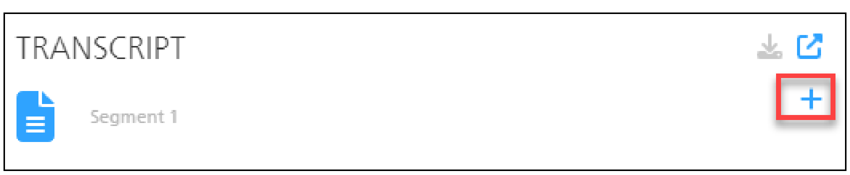
The new window consists of the transcript(s) and the audio file player.

As you play the audio file, you will see the corresponding text highlighted to indicate where you are in the transcript.

Administrators have the ability to delete transcript segments.

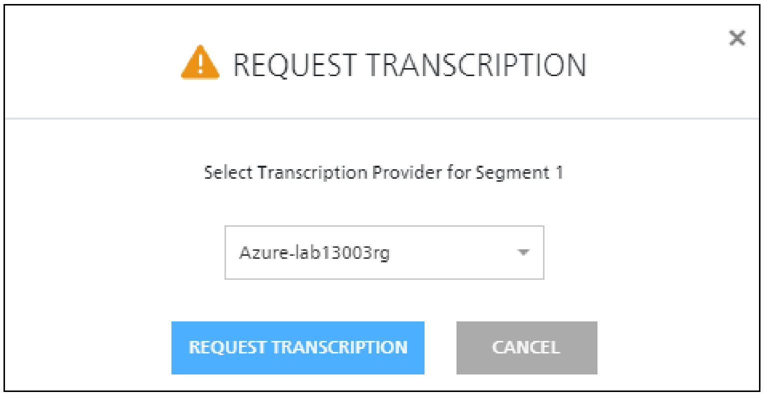
Post-call transcripts can be configured to transcribe all calls or can be scheduled to only transcribe calls that meet certain conditions.

Transcripts can also be requested on demand for certain segments.

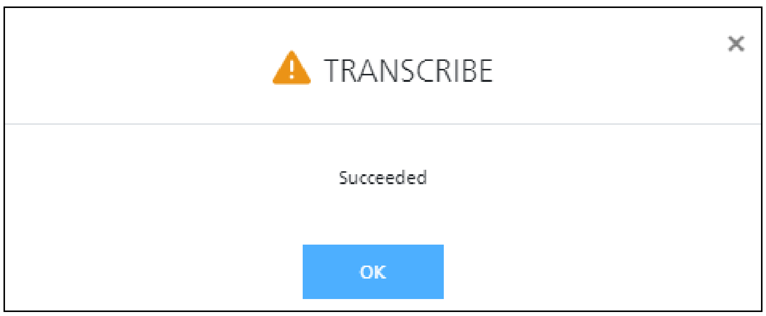


For any segments that have not been transcribed, the plus sign in the top right corner of the field allows users to request transcription.

Select the transcription provider and click *Request Transcription*.

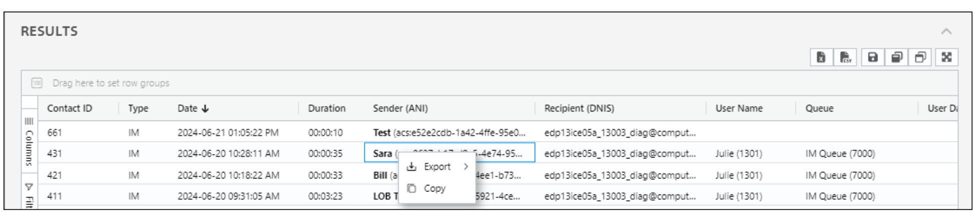


The following window will appear.



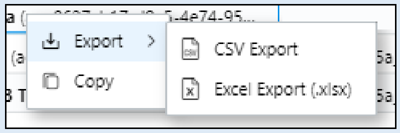
Journal Right-click menu options

Right-click on a row in the table to perform additional tasks, such as exporting or copying the contact details.



The table below provides information on right click menu options in the journal search results grid.

Journal Right-Click Menu	
Menu Option	**Function**
Export	Select this option to export the contacts in the search results grid.

<table>
<tr><td></td><td>When this option is selected, the following options appear:


Click CSV Export to export the results to CSV.
Click Excel Export to export the results to Excel.</td></tr>
<tr><td>Copy</td><td>Select this option to copy the contents of the selected field to the user's clipboard.</td></tr>
</table>

New Advanced Filters

The following table describes the new journal filters added in ice 14.

Advanced Filters	
Contact Metadata Field	Select from the drop-down list containing the available contact metadata fields. This filter will return contacts that have data populated in the specified field. **Note:** The visibility of each contact metadata fields is configured in the contact metadata field settings.
Contact Metadata Value	This field is only available if a Contact Metadata Field has been selected. Further filter your search results to search for a specific value in the contact metadata field. This is an optional field.
Transcript Text	Transcription search supports exact phrase search and individual word search. To search for an exact phrase such as *ticket number*, enter the phrase in double quotes: "ticket number". To search for two distinct words such as *ticket* and *number*, separate the two words by a space without any quotes: ticket number. Search also supports a combination of the two. To search for an exact phrase such as *ticket number* and a distinct word such as *ice*, enter the following: "ticket number" ice.

Contact Metadata Configuration

Contact Metadata allows you to run post-contact jobs to perform actions that may take place when a call is completed. These jobs enable various metadata to be created and associated with the contact. They may be user-defined or pre-built in the system.

Contact Metadata Field

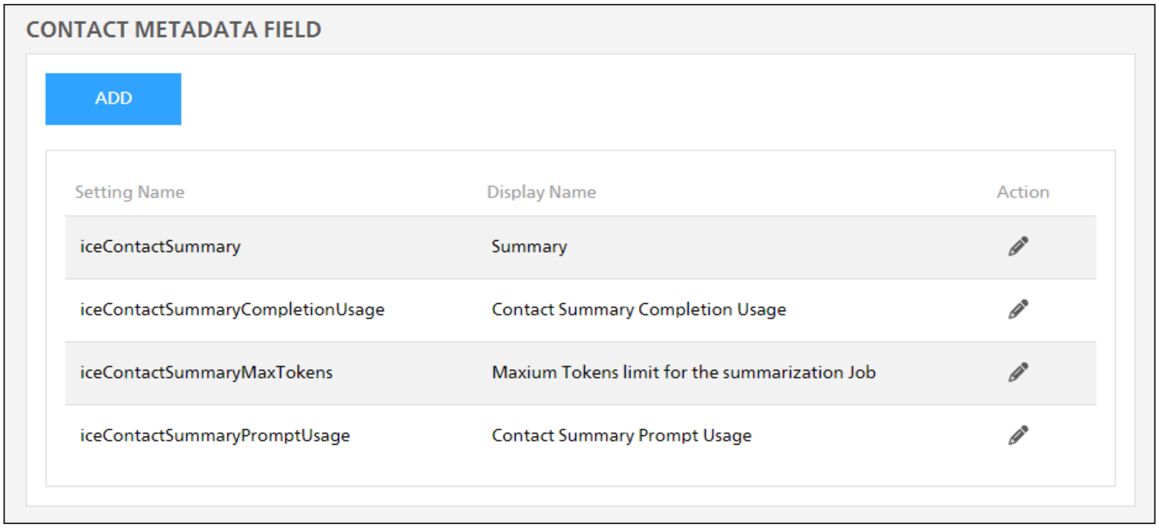
This section can only be modified by Administrators.

Contact metadata fields provide more customization options to allow users to add specific fields of data. Metadata jobs can then be run to populate these fields with additional information.

Four metadata fields are included out of the box for Contact Summarization.

- iceContactSummary
- iceContactSummaryCompletionUsage
- iceContactSummaryMaxTokens
- iceContactSummaryPromptUsage

These fields cannot be deleted.

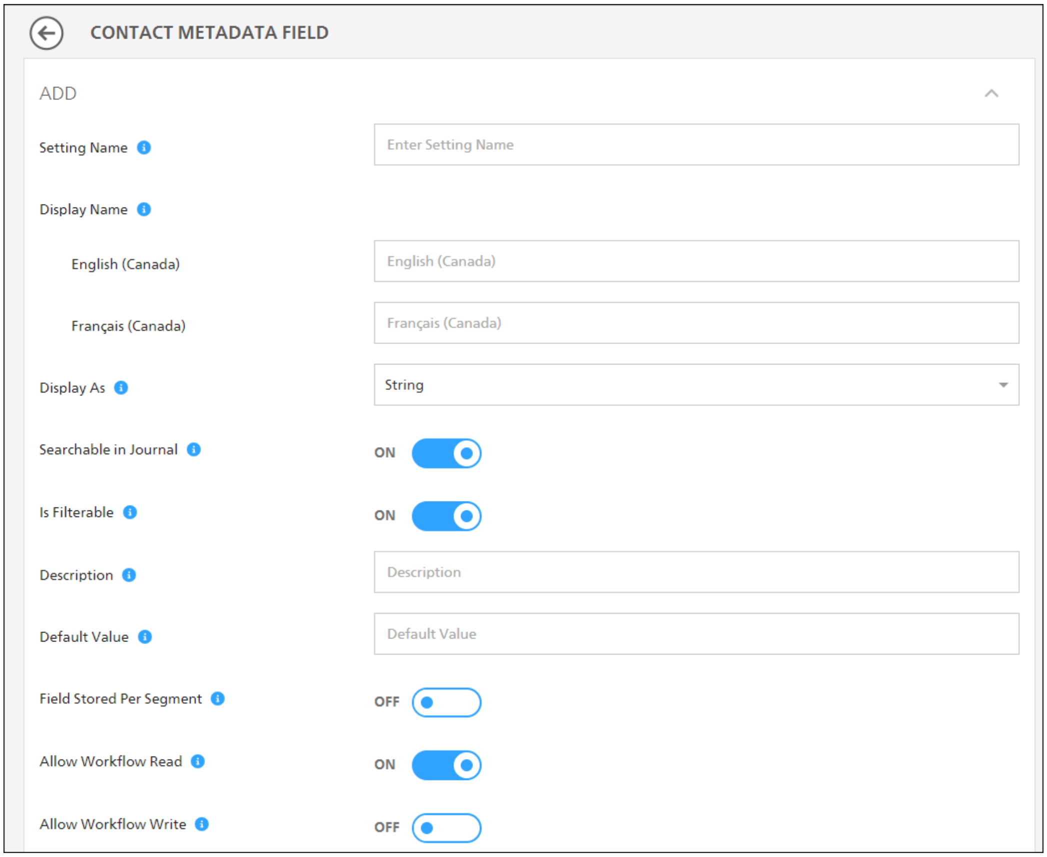


To add, delete, or modify contact metadata fields, click *Contact Metadata Field*. A list of existing fields will display.

Add a field

To add a field, follow these steps:

1. Click the *Add* button. The following display opens:



2. Modify the parameters as required to create a field.

   The table below explains the parameters.

Parameter	Allowable values	Description
Setting Name	Text	Enter the field setting name.
Display Name	Text	The name displayed for the metadata field. There will be one field for each enabled language in iceManager.
Display As	String Url Integer	Select the object type used to display the field content.

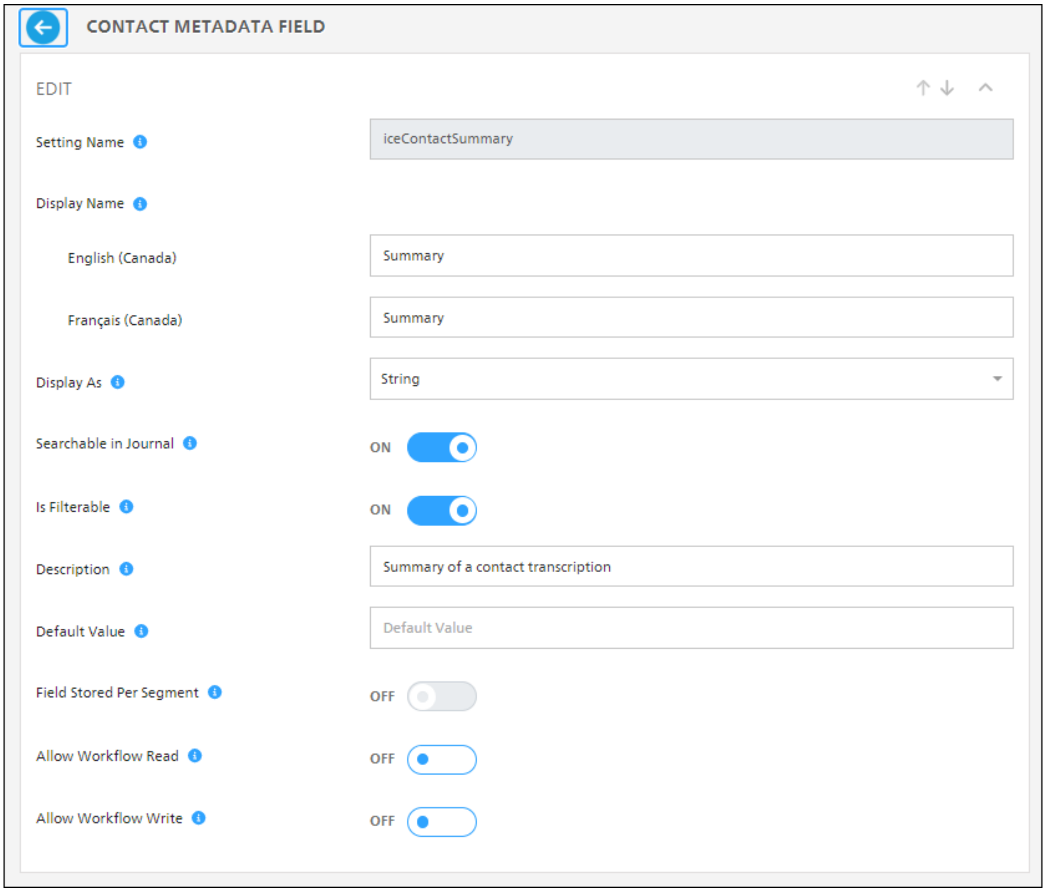
	Decimal Csv List Json List	
Searchable in Journal	On/Off	If enabled, the field will be displayed in journal in the Contact Metadata table.
Is Filterable	On/Off	If enabled, the field will be displayed in the Contact Metadata filter in journal. This will allow users to filter contacts based on this metadata field and its value.
Description	Text	A description of the field’s purpose.
Default Value	Text	The default value provided when no value is specified. This is an optional value.
Field Stored Per Segment	On/Off	If enabled, the field will be stored per segment rather than the entire contact.
Allow Workflow Read	On/Off	If enabled, allows workflow to read the metadata field.
Allow Workflow Write	On/Off	If enabled, allows workflow to write to the metadata field.

3. Once all the parameters have been filled, click *Add*. The new field is added to the list. If you do not wish to add the field, click *Return to previous page*.

   The new field appears on the bottom of the list.

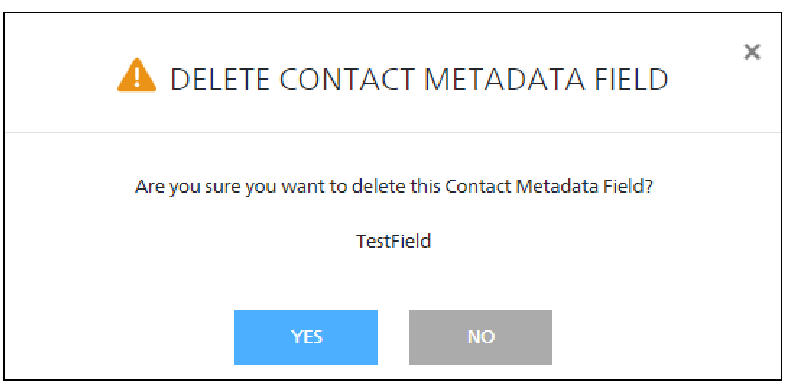
<u>To edit a field:</u>

1. Click the pencil icon located in the Action column.
2. Make the appropriate changes and click *Save*.



<u>To delete the field:</u>

1. Click the garbage can icon located in the Action column.
   When you delete a field, an "Are you sure you want to delete this Contact Metadata Field" message appears.
2. Select *Yes* to proceed with the deletion. Click *No* to cancel the deletion.



Once you click *Yes* the field is removed from the list.

To clone the field:

1. Click the clone icon located in the Action column.
   When you clone a field, an “Are you sure you want to clone this Contact Metadata Field” message appears.
2. Select *Yes* to proceed with the cloning. Click *No* to cancel the cloning.

Once you click *Yes* the new field is added to the list.

Contact Metadata Job

This section can only be modified by Administrators.

Contact metadata jobs are created to run when contacts are completed, in order to populate contact metadata fields with additional information. Currently, ice supports Azure OpenAI jobs and Virtual Workflow jobs.

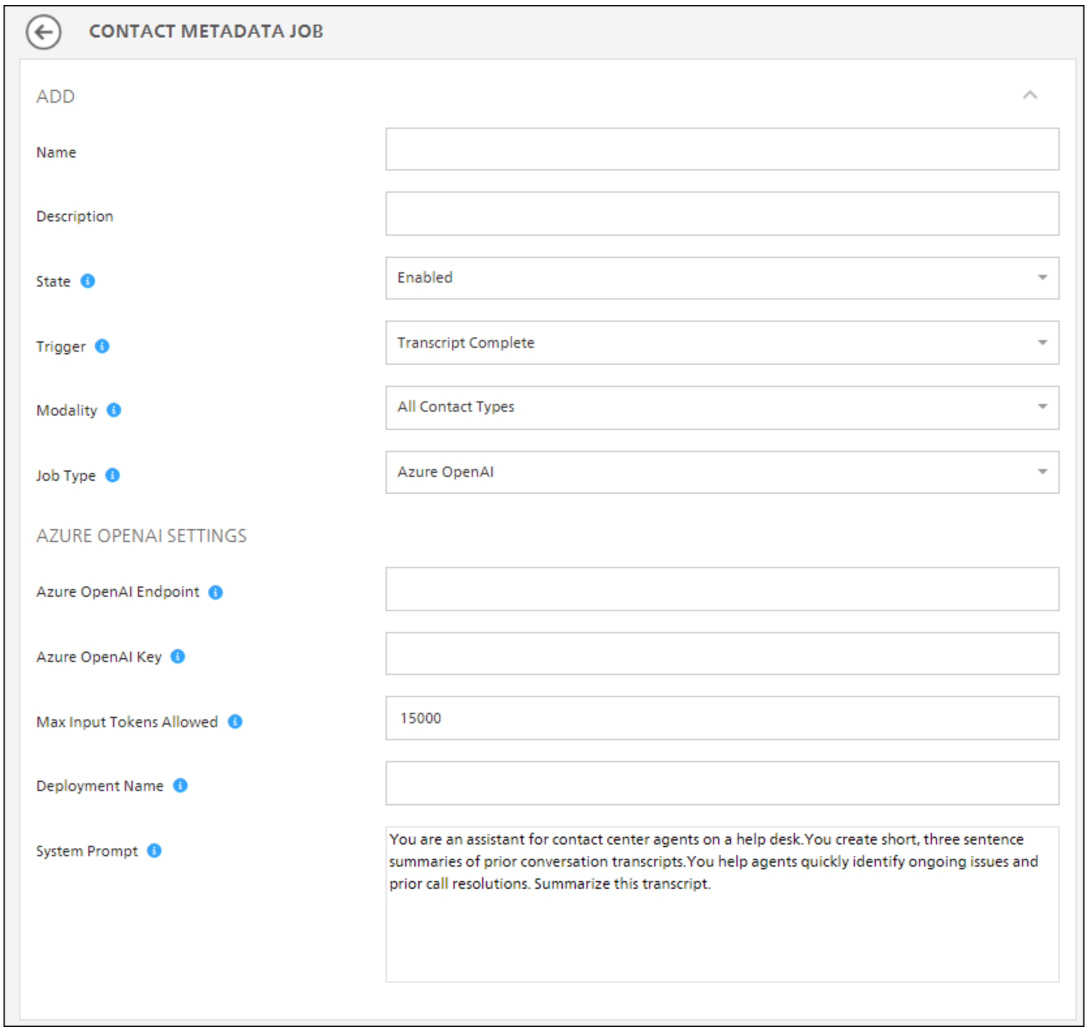
The iceVoiceContactSummary14 job is included out of the box for Contact Summarization, visible in iceJournal. This job cannot be deleted.

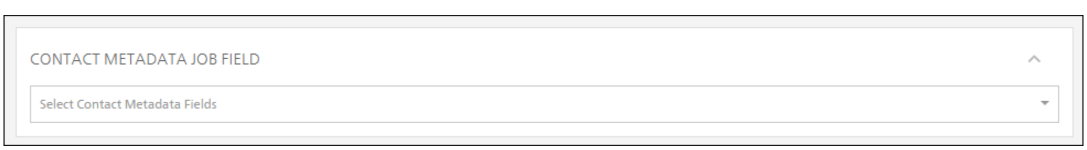
To add, delete, or modify contact metadata jobs, click *Contact Metadata Job*. A list of existing jobs will display.

Add a Job

To add a job, follow these steps:

1. Click the *Add* button. The following display opens:





2. Modify the parameters as required to create a job.

   The table below explains the parameters.

Parameter	Allowable values	Description
Name	Text	Enter the field setting name.
Description	Text	A description of the contact metadata field.
State	Enabled Disabled Preview	Enabled: This state is required to configure jobs to run on a schedule. Disabled: The job does not run. Preview: The job runs ad hoc by clicking the *Preview* button in iceJournal.
Trigger	Transcript Complete Contact Complete Job Complete	The trigger which is required for the job to run. Contact metadata jobs can be linked together through the *Job Complete* option. Virtual workflow jobs require the trigger to be set to *Contact Complete*. GenAI jobs using call transcription to generate content require the trigger to be set to *Transcript Complete*.
Modality	All Contact Types Unknown Voice IM Autodial Email	The contact modality. Currently, GenAI jobs are only supported for voice contacts. Virtual workflow jobs support all modalities.
Job Type	Azure OpenAI Virtual Workflow	The job type.
Azure OpenAI Settings		
Azure OpenAI Endpoint	Text	The API endpoint for Azure Open AI.
AzureOpenAI Key	Text	The API Key for Azure Open AI.

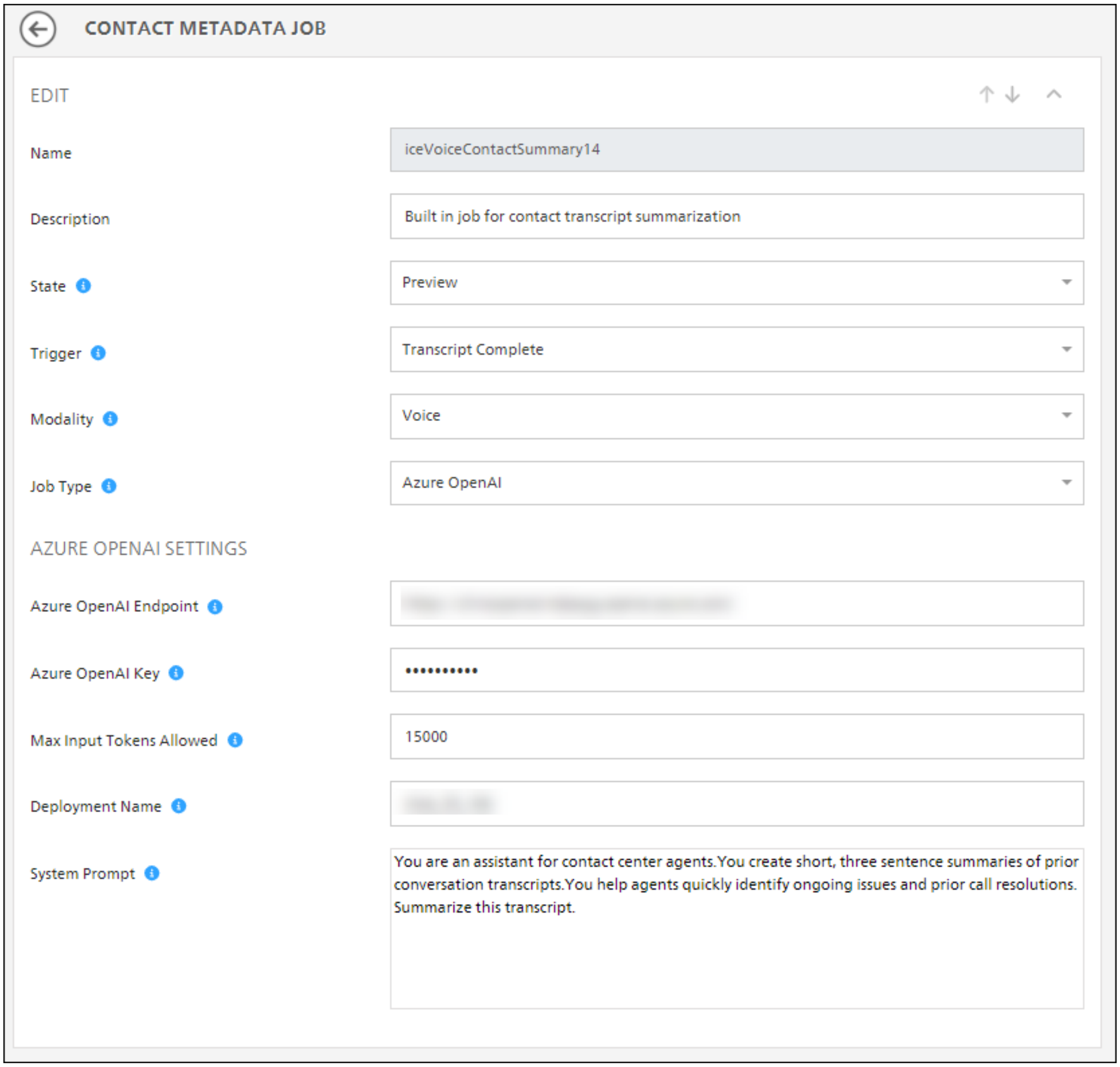
Max Input Tokens Allowed	Text	The maximum tokens allowed for usage. The default value is 15000
Deployment Name	Text	The Azure Open AI deployment name. This indicates which Azure OpenAI model to use.
System Prompt	Text	The GenAI prompt used to generate the data.
Contact Metadata Job Field	Text	The list of metadata job fields and the JSON path used to map data fields to values associated with certain keys in the JSON.
Virtual Workflow Settings		
Contact Type	Voice IM Email	The type of contact that the job will run for.
UC Group	A dropdown list of your available UC Groups	The UC Group associated with the job.
User Data	Text	Additional user data that can be passed to virtual workflow. At the moment, ice only supports Contact Transcript, the handling agent name, and the list of agents who handled the contact.

4. Once all the parameters have been filled, click *Add*. The new job is added to the list. If you do not wish to add the job, click *Return to previous page*.

   The new job appears on the bottom of the list.

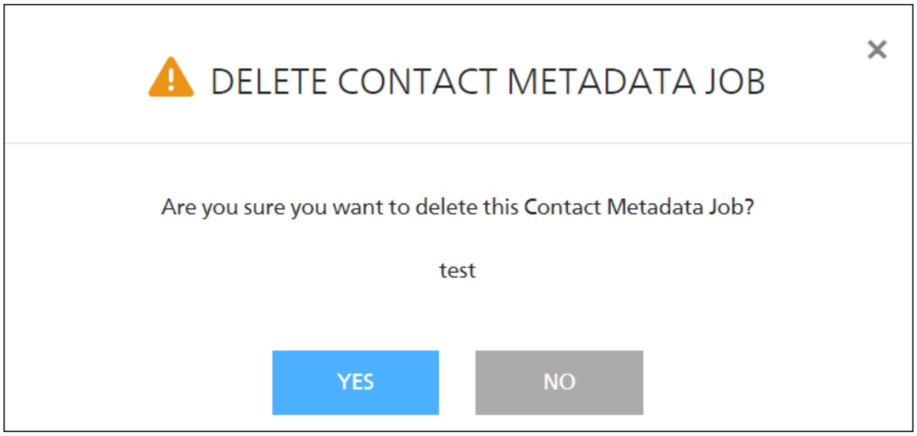
<u>To edit a job:</u>

1. Click the pencil icon located in the Action column.
2. Make the appropriate changes and click *Save*.



<u>To delete the job:</u>

1. Click the garbage can icon located in the Action column.
   When you delete a field, an “Are you sure you want to delete this Contact Metadata Field” message appears.
2. Select *Yes* to proceed with the deletion. Click *No* to cancel the deletion.



Once you click *Yes* the job is removed from the list.

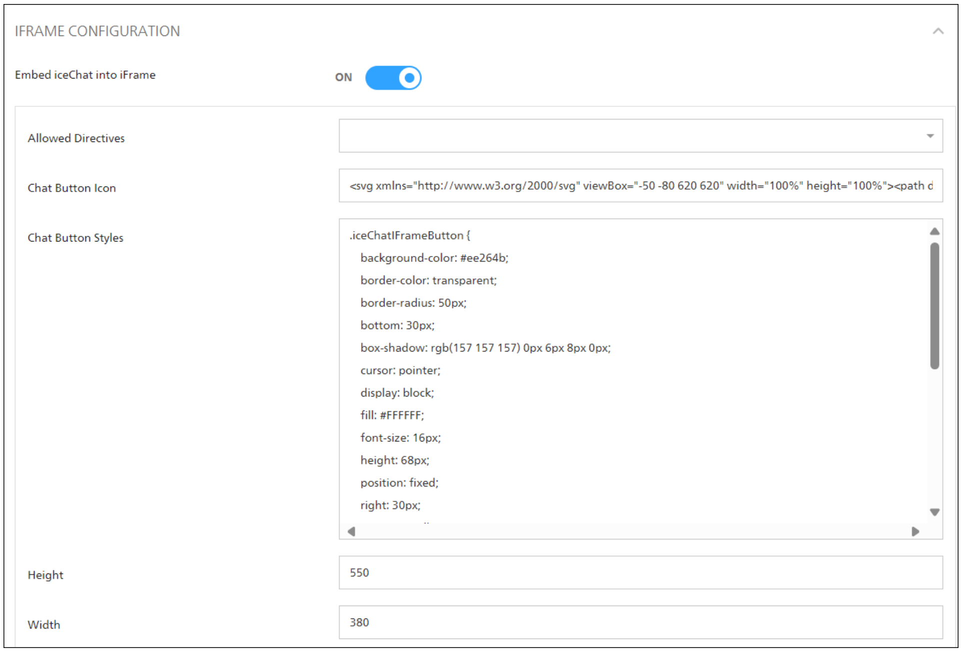
Chat Improvements

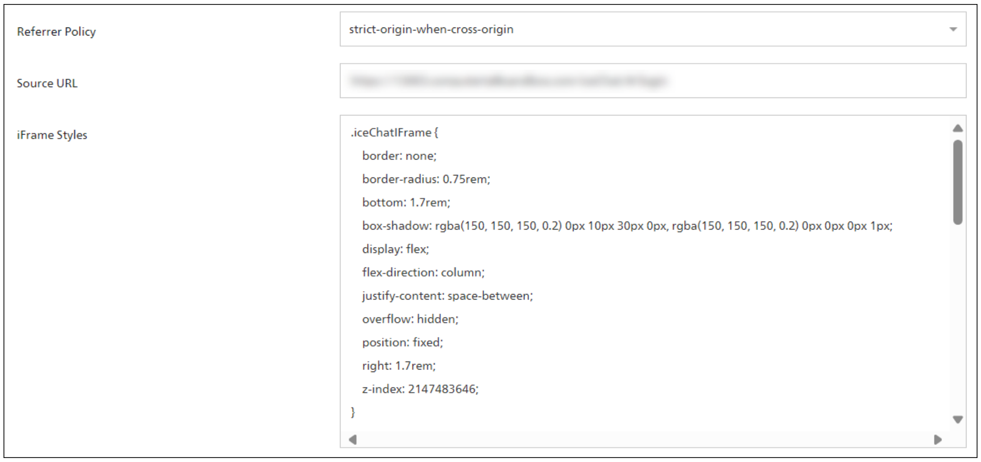
A number of iceChat UI elements have been made configurable allowing for increase customization of the window. Additionally, iceChat now supports being embedded into an iFrame in a customer's website.

iFrame Configuration

ice 14 supports embedding iceChat into an iFrame on an external website. The iFrame configuration settings can be configured in *Chat Destinations*, including the chat button icon, chat button styles, height and width of the iFrame, and the iFrame styles.

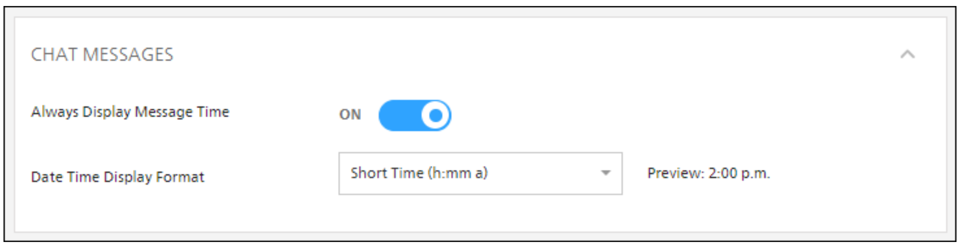
Note: Login pages using iFrame require the use of an Adaptive Card. Custom login pages without Adaptive Cards are supported only in pop-up windows.





Once the settings have been configured and saved, the JavaScript code in the “Embed Code” section can be copied to your website.

The message time and date displayed in the chat window can now be configured to your preferred format.



The table below defines the new settings for chat destinations in ice 14.

iFrame Configuration	
Embed iceChat into iFrame	If enabled, iceChat may be embedded into an iFrame. Note: iFrame should be used with the *Rehydrate* Chat Rehydration Mode.
Allowed Directives	The list of allowed directives.
Chat Button icon	The chat button icon. This field can accommodate a html image tag with a source or svg, but cannot accommodate a URL.
Chat Button Styles	The chat button styles in CSS.
Height	The height of the iFrame.
Width	The width of the iFrame.
Referrer Policy	The referrer policy controls how much referrer information should be included with requests.

Start Chat Minimized	If enabled, the chat will start minimized.
Source URL	Specifies the URL of the page you want to display.
iFrame Styles	The iFrame styles in CSS.
Embed Code (JS)	Code to embed iceChat in iFrame
iFrame Localization	
Chat Button Aria-Label	The text for the chat button aria-label.
Chat Button Tooltip	The tooltip text for the chat button.
Title	Users navigating with assistive technology such as a screen reader can use the title attribute on an iframe to label its content. The title's value should concisely describe the embedded content.
Hide Print Button on End Chat Popup	Options include On/Off. Enable this setting to hide the print button on the popup when a chat ends.
Chat Messages	
Always Display Message Time	Options include On/Off. Enable this setting to always display the message time.
Date Time Display Format	Options include: • Short Time (h:mm a) • Medium Time (h:mm:ss a) • Long Time (h:mm:ss a z) • Short Date (yyyy-MM-dd) • Medium Date (MMM dd, yyyy) • Long Date (MMMM dd, yyyy) • Short Date Time (yyyy-MM-dd, h:mm a) • Medium Date Time (MMM dd, yyyy, h:mm:ss a) • Long Date Time (MMMM dd, yyyy, h:mm:ss a z) where a denotes a.m. or p.m. and z denotes the time zone.

iceChat UI Enhancements

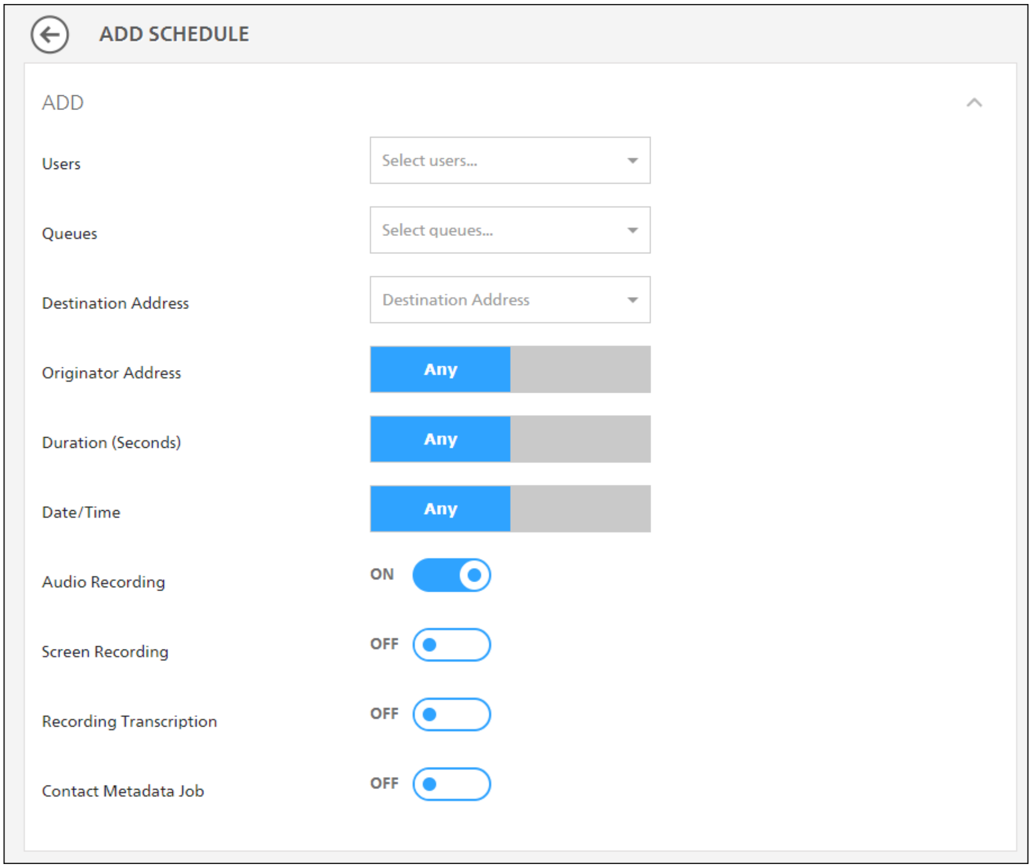
A number of iceChat UI elements have been made configurable in ice 14 including the width of chat bubbles, spacing between chat bubbles, and font size. The table below details the newly added settings.

Chat Style Properties	
Parameter	Details
Messages	
Minimum Width (%)	The minimum width of the message bubbles when viewed in the chatbox. Default minimum is 20%. Value must be within the range of 20% - 80%.
Maximum Width (%)	The maximum width of the message bubbles when viewed in the chatbox. Default maximum is 80%. Value must be within the range of 20% - 80%.
Space Between Bubbles of Messages Sent Within a Minute (px)	Space between the message bubbles for messages sent within a minute of each other.
Space Between Bubbles of Messages Sent (px)	Space between the message bubbles for messages sent in a time span outside of a minute from the last message sent.
Agent Message Bubble Border Radius (px)	The border radius of the incoming message bubble border. Defaults to 10 px.
Agent Message Bubble Border Thickness (px)	The border thickness of the incoming message bubble border. Defaults to 1 px.
User Message Bubble Border Radius (px)	The border radius of the outgoing message bubble border.

	Defaults to 10 px.
User Message Bubble Border Thickness (px)	The border thickness of the outgoing message bubble border. Defaults to 1 px.
System Message Bubble Border Radius (px)	The border radius of the system message bubble border. Defaults to 10 px.
System Message Bubble Border Thickness (px)	The border thickness of the system message bubble border. Defaults to 1 px.
Workflow Message Bubble Border Radius (px)	The border radius of the incoming message bubble border. Defaults to 10 px.
Workflow Message Bubble Border Thickness (px)	The border thickness of the workflow message bubble border. Defaults to 1 px.

Schedules

In ice 14, new settings have been added to the schedule configuration for recording transcription and contact metadata jobs. Schedules can be configured to generate post call transcriptions and contact metadata for calls that meet specific criteria.



Monitor

Alerts based on state time

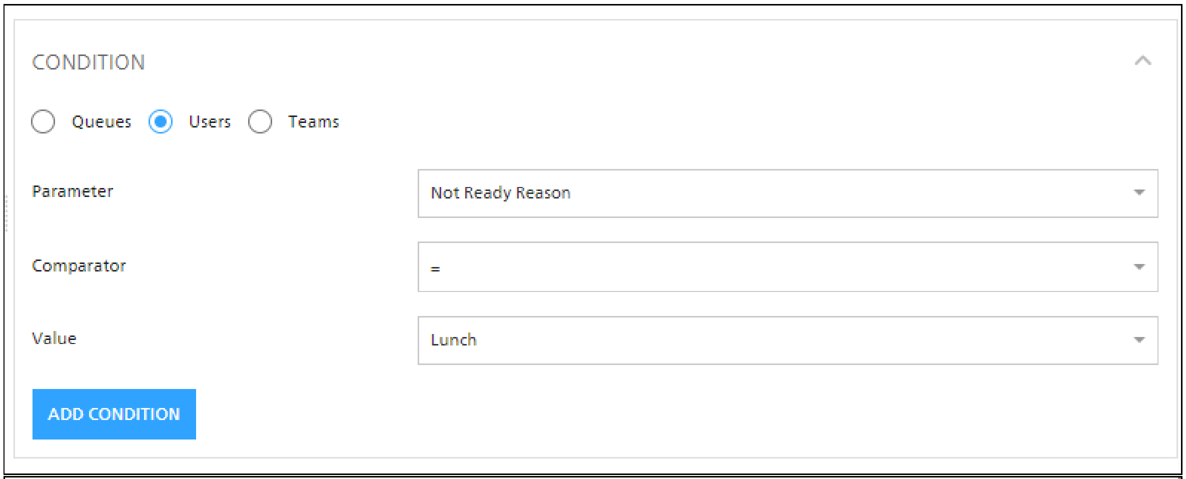
In ice 14, new user parameters have been added to support the creation of alerts based on agent state time and specific not ready reasons.

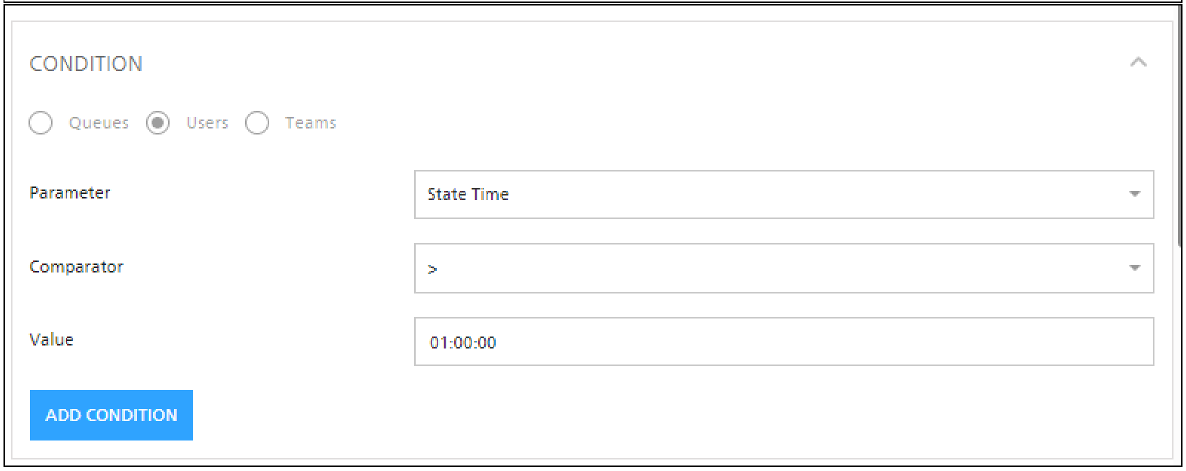
<u>Consider the following example:</u>

You have been asked to set an alert to notify you when users have been on lunch for longer than 1 hour.

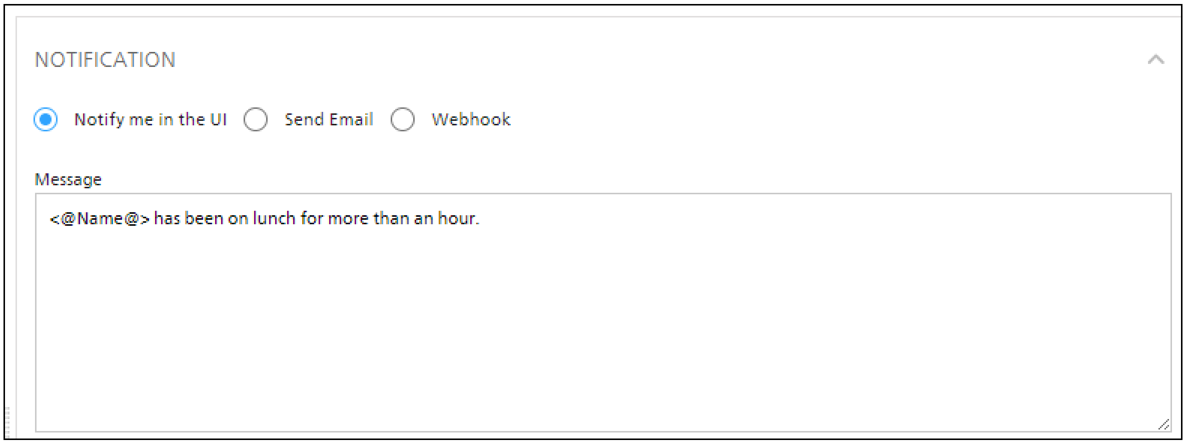
First, set the following User conditions where Not Ready Reason is equal to Lunch, and State Time is greater than 1 hour.

Note: Your Not Ready Reasons may be configured with different names.

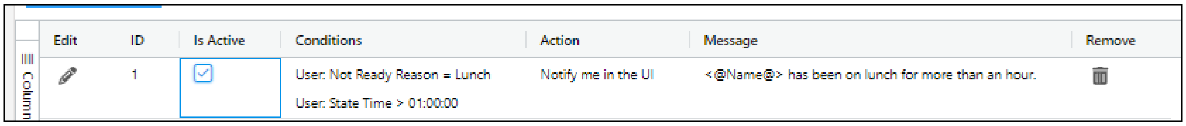




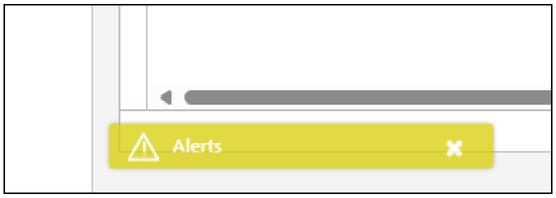
Next, set your preferred notification style. This example shows a message where the name variable will be replaced with the name of the user, indicating that they have exceeded their lunch break.

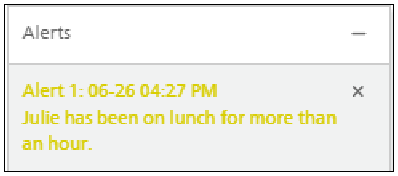


The final alert should look similar to the following screenshot.



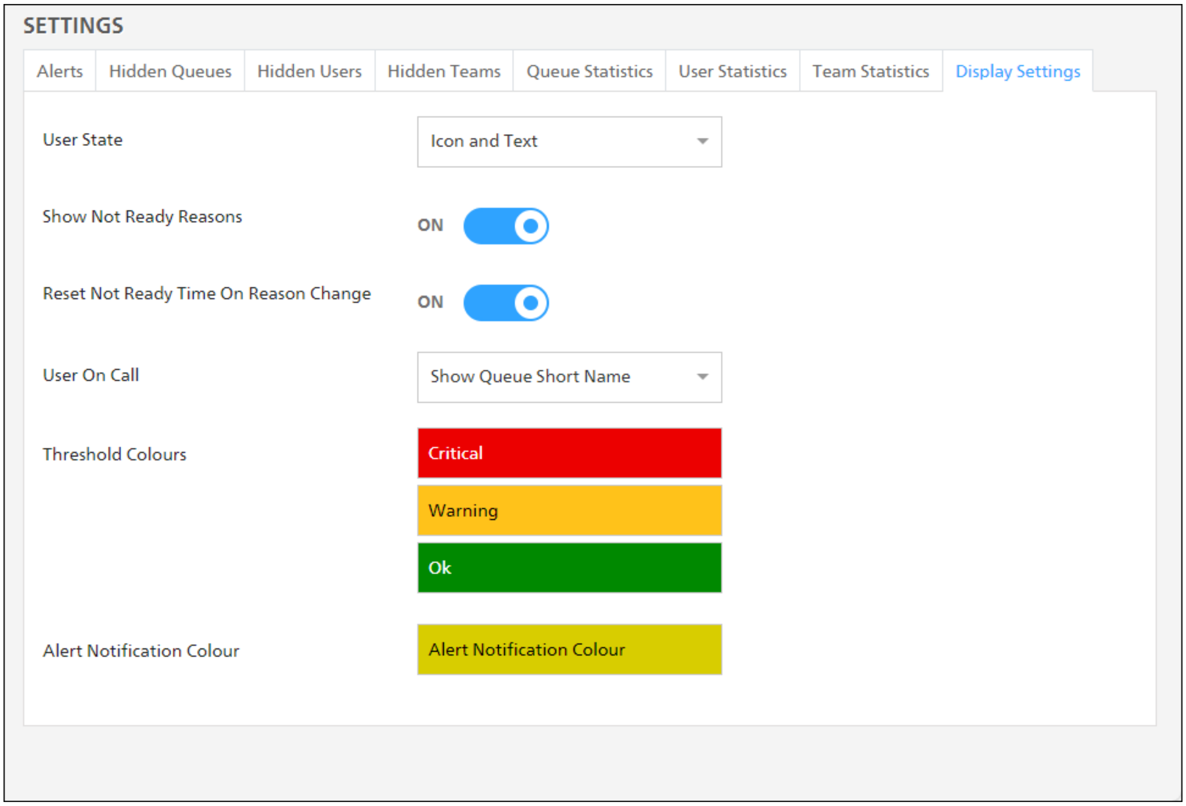
When the conditions have been met, you will see the following alert in iceMonitor:





To configure the colour of the alert notification in iceMonitor, a new setting has been added to the display settings page.

The alert notification colour setting allows you to select your preferred colour for the notification.



Screen Pop Support in Workflow

In ice 14, we are introducing workflow-driven screen pop. A new Screen Pop workflow action is available in workflow and can instruct iceBar to pop a URL in the default browser of iceManager. This works in conjunction with an enhanced virtual workflow action that can be triggered based on a CDR or ADR event, such as call alerting.

iceReporting

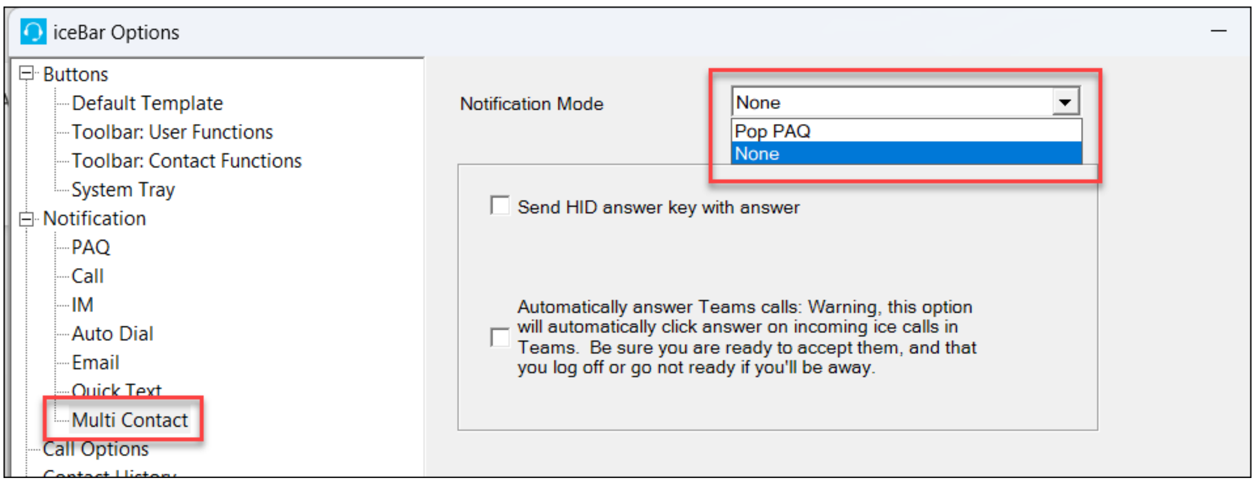
The new *ContactLOBEvent Data Only* report provides detailed information on contact LOB events as found in the ContactlOBEvent table. This report is primarily used for generating raw data for contact LOB event information.

The *Contact Summary Report* has also been updated to include the LOB codes tagged for each contact included in the report.

iceBar for Desktop

PAQ Window Pop Setting

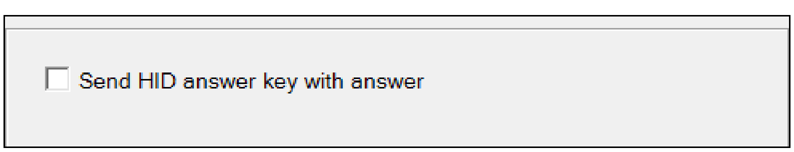
For agents with the multi-handling COS, the auto pop of the PAQ window is now configurable. The multi-contact notification setting determines if the PAQ window opens for each additional contact received after the first.



If POP PAQ is selected, your PAQ window will open when you are presented with an additional contact. If "None" is selected, your PAQ will not open when you are presented with an additional contact. The POP PAQ notification mode is the default setting.

Send HID answer key with answer

This option allows users to answer incoming ice calls in Teams using the iceBar answer key as the call is alerting. When this option is enabled, users do not need to answer the Teams call first in order to set themselves off-hook. They can answer directly from the iceBar answer button. **Note:** The user must not be set to auto answer as doing so disables the answer button.



Automatically answer Teams calls

This option allows iceBar to automatically answer incoming ice calls in Teams. When this is enabled, users will not need to answer the Teams cal first in order to set themselves off-hook. iceBar will automatically answer the incoming call and connect the user to the call. Users must be ready to accept the call and remember to set themselves to the not ready state is they are unavailable to answer.